



GULF COAST

PLACE MAKING & TALENT ATTRACTION REPORT

NOVEMBER 16, 2018



Gulf Coast | Business Council

LEADERSHIP FOR REGIONAL SOLUTIONS.



THE UNIVERSITY OF
**SOUTHERN
MISSISSIPPI**
COLLEGE OF BUSINESS



THE UNIVERSITY OF
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TRENT LOTT
NATIONAL CENTER



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Table of Contents

EXECUTIVE SUMMARY	4
INTRODUCTION	5
METHODOLOGY	7
Prosperity	10
Place	16
Product	26
Programming	38
People	43
Promotion	52
CONCLUSION	59
REFERENCES	61



Executive Summary

GULF COAST REGION PLACE MAKING & TALENT ATTRACTION

The Gulf Coast Business Council commissioned The University of Southern Mississippi Trent Lott National Center for Economic Development and Entrepreneurship to conduct a comparative analysis of the Mississippi Gulf Coast Metropolitan Statistical Area's ability to compete in *Place Making and Talent Attraction*.

As a part of its mission, the Gulf Coast Business Council champions common economic and business interests of the Mississippi Gulf Coast through a variety of activities, including identifying emerging issues, convening resources, framing public policy and developing transformational solutions for the Mississippi Gulf Coast. The Gulf Coast Business Council engages top executives of businesses – large and small – to be the united voice on public policy issues important to the Mississippi Gulf Coast and to serve as a facilitating organization to help develop future leaders and transformational initiatives.

This report compares the Gulf Coast Region to 10 other Southeastern metro areas to gain insights regarding where it stands in attracting professionals and making them permanent residents. In all, the region has a competitive advantage in the following areas:

- ✧ Coastal communities are growing at a faster pace than non-coastal regions in the United States and worldwide.
- ✧ In 2017, the Mississippi Gulf Coast had 13.5 million personal trips, increasing 6.3 percent from 2015. The Mississippi Gulf Coast grew about twice the national growth in destination travel, thus increasing its market share (Visit Mississippi Gulf Coast and Longwoods International).
- ✧ Nationally, more people are choosing to live in urban versus rural areas. This urban-bound migration trend has potential to help grow the Gulf Coast's number of residents who remain single, marry later in life, raise smaller families, or choose cohabitation.

This *Place Making and Talent Attraction* report assesses an important topic of the coastal economy's ability to foster an atmosphere of attracting talent and highly skilled workers. The results of the study can be useful in addressing areas where new initiatives are needed, where existing programs and services are working well, and where barriers of success are preventing the Gulf Coast from reaching its fullest potential.

The workforce comprising the innovation and creative sector nationally represents a population of adults who can choose where they want to live and work, and they seek communities that offer a wide variety of amenities and cultural opportunities. Research indicates that no single factor alone can create a sense of "Place", but rather a combination of social, economic, cultural and other factors creates an attractive place to live and work. The success of targeted destination marketing initiatives in recent years offers potential for expanding regional cooperation into attracting not only tourists but also permanent residents who want to live AND work along the Mississippi Gulf Coast.

Introduction

The Mississippi Gulf Coast must become a region where talented and creative people choose to live AND work. Cities and regions considered to be the best places to live nationally offer a rich mixture of cultural, social, policy, and economic factors which foster innovation and lead to new discoveries, technical creativity, and artistic expression. This population of innovative and creative people can choose where they want to live and work, and they seek communities that offer a high combination of amenities and experiences. When combined and compared, the process is referred to as *Place Making and Talent Attraction*.

GOAL:

Attract the Innovative and Creative Class by improving Place Making and Talent Attraction of the Gulf Coast Region

This *Place Making and Talent Attraction* report assesses the coastal economy's ability to attract highly skilled workers who want to live and work along the Mississippi Gulf Coast. This report is a comparative study of the Gulfport-Biloxi-Pascagoula Metropolitan Statistical Area (MSA) - inclusive of Hancock, Harrison and Jackson Counties - to 10 other Southeastern metro regions. Secondary data and statistics of the Gulf Coast Region were compared to 10 other targeted regions in order to better understand where the Gulf Coast is competitive regarding Place Making and Talent Attraction. The results of the study can be useful in addressing areas where new initiatives are needed, where existing programs and services are working well, and where barriers of success might be preventing the Gulf Coast from reaching its fullest potential.

The current state of the Mississippi Gulf Coast economy will not change quickly. No single event or series of events will transform the Gulf Coast in the short term. Yet, the Mississippi Gulf Coast can position itself to leverage the nationwide shift of metropolitan areas outpacing rural regions in population and job growth (Ehrenhalt, 2012). Leaders throughout the coastal economy can capitalize on this urban phenomenon to attract talent and to serve as a magnet for drawing a larger number of families wanting to live locally.

About 10 percent of all jobs in the U.S. belong in the innovation sector (Moretti, 2012). While this number is growing, it will never constitute the majority of total employment. Because of a multiplier effect, each new highly technical job in the U.S. creates five additional jobs in the service economy. The Gulf Coast Region should target jobs in the innovation sector—a sector which produces goods or services that are primarily sold or traded outside the region. It is this sector in which a region's prosperity is driven, and it is this sector that creates additional jobs in the non-traded sector. For example, attracting a new scientist, engineer or mathematician to a city increases the demand for local services exponentially.

For each new job in innovation sector, other jobs are supported in the region

This, in turn, means more jobs from service sectors that help support a robust local economy. The U.S. economy is moving toward a model in which millions of people with substantial earning power or ample savings will have the option to live anywhere they choose, and many are favoring urban areas over rural areas (Ehrenhalt, 2012). This demographic inversion of people choosing

to live in urban versus rural areas has potential to help grow the Gulf Coast's population, particularly of those in the innovative and creative class who remain single, marry later in life, raise smaller families, or choose cohabitation. It also has potential to grow the population of healthy and active adults who prefer upscale living in more urban areas.

ADVANCED ECONOMIES ARE DRIVEN BY INNOVATIVE & CREATIVE KNOWLEDGE WORKERS WHO INCLUDE:



Advanced economies, as stated by Richard Florida in *The Rise of the Creative Class*, are driven by innovative and creative knowledge workers (Florida, 2002). These are the problem solvers necessary to push innovation and research into new products and services in a variety of fields. Problem solvers making up the creative class include individuals like those working in business and financial operations, healthcare practitioners and technical, legal advisors, engineers, life, physical and social sciences, managers, computer, architects, high-end sales, arts and design, education and mathematics. They tend to create new ideas, new technology, or new creative content. Florida's research further states that blue-collar sectors with technical skills are some of the fastest-growing job categories alongside the creative ones (Florida, p.46). These professional occupations pay higher salaries and, as Human Capital Theory puts forth, economic growth is best achieved by protecting and promoting local endowments of highly educated, productive people (Glaeser, 2011). The creative class tends to have higher job mobility, and this affords them options for choosing places to live that have attractive living conditions more so than focusing primarily on proximity to their job (Trip, 2007).



Methodology – Place Making & Talent Attraction

This report will measure the *Place Making and Talent Attraction* of the Mississippi Gulf Coast Region by identifying and analyzing factors in six categories: Prosperity, Place, Product, Programming, People and Promotion, based on the practice and methodology of Resonance Consulting's¹ *World's Best Cities – A Ranking of Global Place Equity*. The six pillars defining Place Making and Talent Attraction were determined through Resonance's analysis of mobile Americans between the ages of 20 and 36. These pillars influence where innovative and creative workers choose to live and work.



PROSPERITY

- Cost of Living Index
- Economy
- Income
- Labor force participation and unemployment
- Per capita income



PLACE

- Environment: Air quality, land quality, Superfund sites, Brownfield sites
- Weather: Average number of sunny days
- Safety: Crime rates
- Recreation: Number of parks and outdoor/activity recreation facilities
- Amenities



PRODUCT

- Liveliness and Culture: Number of museums, historical sites, and presence of fine arts
- Airline connectivity: Number of direct destinations served by airport
- Amenities: Number of quality attractions
- Higher Education: Ranking of top local universities
- Internet Infrastructure: Access and quality of programming broadband internet



PROGRAMMING

- Nightlife: Presence of businesses supporting local nightlife
- Dining: Number of quality restaurants
- Shopping: Availability of retail shopping
- Housing: Housing availability, quality and cost



PEOPLE

- Diversity: Percentage of foreign-born residents
- Education Attainment: Percentage of the population with a bachelor's degree or higher
- Talent and Creativity: Artistically creative people and skills of local workforce
- Innovativeness: Patents per capita



PROMOTION

- News: Annual web-based search rates
- Travel Media: Number of Trip Advisor listings and reviews
- Online Presence: Evaluation of city's website and social media presence

Resonance Consulting's factors work in alignment with data points identified by Jan Jacob Trip in *Assessing Quality of Place: A Comparative Analysis of Amsterdam and Rotterdam*. Trip's research focused on the attraction of the creative class and built upon previous work by Richard Florida's *Rise and the Creative Class*. While there are studies that consider subjective factors, these quantifiable variables provided baseline measurements that local government has some authority to strengthen or improve. Place Making and Talent Attraction indicators, when properly used, will assist in the creation of an environment that is appealing to the innovative and creative class and support the community's strategic planning initiatives for attracting residents and businesses. Community leaders can utilize this data to identify critical issues of priority and formulate actionable plans to address those issues.

COMPARISON CITIES

The Gulf Coast Region can position itself to compete in attracting workforce and population by setting aspirational goals comparable to thriving communities. For the purpose of this report, thriving communities were identified as Huntsville, AL; Fayetteville, AR; and Nashville, TN because these Southeastern metropolitan statistical areas ranked in the Top 11 for the U.S. News & World Reports' 2018 *Best Places to Live*. The metro areas of Baton Rouge, LA; Pensacola, FL; New Orleans, LA; Lafayette, LA; Mobile, AL; Hattiesburg, MS; and Jackson, MS were benchmark communities identified because these metro regions have similar geographic characteristics.

U.S. News & World Report's *Best Places to Live* rankings help individuals make informed decisions when choosing where to settle down. This data was categorized into five indicators: job market, value, quality of life, desirability, and net migration; and then evaluated using a ranking score determined by Americans' preferences. Among the Southeastern metro areas, Fayetteville, Huntsville and Nashville made the Top 11 ranking (see Table 1).

TABLE 1

Top 11 Ranking of Best Places to Live in the United States (2018)

1	AUSTIN, TEXAS	7	HUNTSVILLE, ALABAMA
2	COLORADO SPRINGS, COLORADO	8	WASHINGTON, D.C.
3	DENVER, COLORADO	9	MINNEAPOLIS, MINNESOTA
4	DES MOINES, IOWA	10	SEATTLE, WASHINGTON
5	FAYETTEVILLE, ARKANSAS	11	NASHVILLE, TENNESSEE
6	PORTLAND, OREGON		

Source: U.S. News & World Report's Best Places to Live

1 Resonance Consulting publishes research-based reports to help its clients and communities understand trends and demographics, identify new market opportunities, and create plans for the future. The reports are useful for cities to understand their strengths and weaknesses as a means of attracting visitors, talent and investment. As part of its work to create sustainable development strategies, Resonance uses proprietary methodologies and publishes original research such as *World's Best Cities* and *America's Best Cities* rankings, *Tourism Quality Performance* reports, and portraits of various travelers' demographics.



PROSPERITY

This section measures prosperity from the perspective of both the overall economy and an individual's prosperity. A community must generate new wealth to sustain its population, or it will decline. As Resonance Consulting emphasized, "A well-paid, economically secure citizenry facilitates stewardship and innovation" (resonanceco.com). The extensive research by Richard Florida revealed that the innovative and creative class looks for places to live and work that offer many and varied employment opportunities. Companies need an abundant labor pool, and people need a thick labor market of jobs.

PROSPERITY SUMMARY

Prosperity among citizens is a major factor in a community's ability to be considered highly attractive in Place Making and Talent Attraction. Compared to the other regions, the Mississippi Gulf Coast Region has an advantage of having the lowest cost of living making it the most affordable region studied. However, its overall economic strength lags behind the other benchmark communities in growing specialized occupations with high multiplier effects on the economy. The Region should strengthen specialized capabilities of its people, companies and resources particularly in innovation sectors in order to fuel economic growth.

COST OF LIVING INDEX

Cost of Living Index measures how expensive it is to live in one city verses another. It is defined as the average price of goods and services that people need to spend on food, clothing and other basic goods and services. The Gulf Coast Region's cost of living index of 87.1 makes the region more affordable than any of the other ten regions (see Table 2). In other words, a person living along the Gulf Coast spends on average of 87.1 percent of the national average on food, clothing and basic needs. The cost of living index rankings for the other ten regions is between 87.1 and 100.9 (EMSI, 2018).

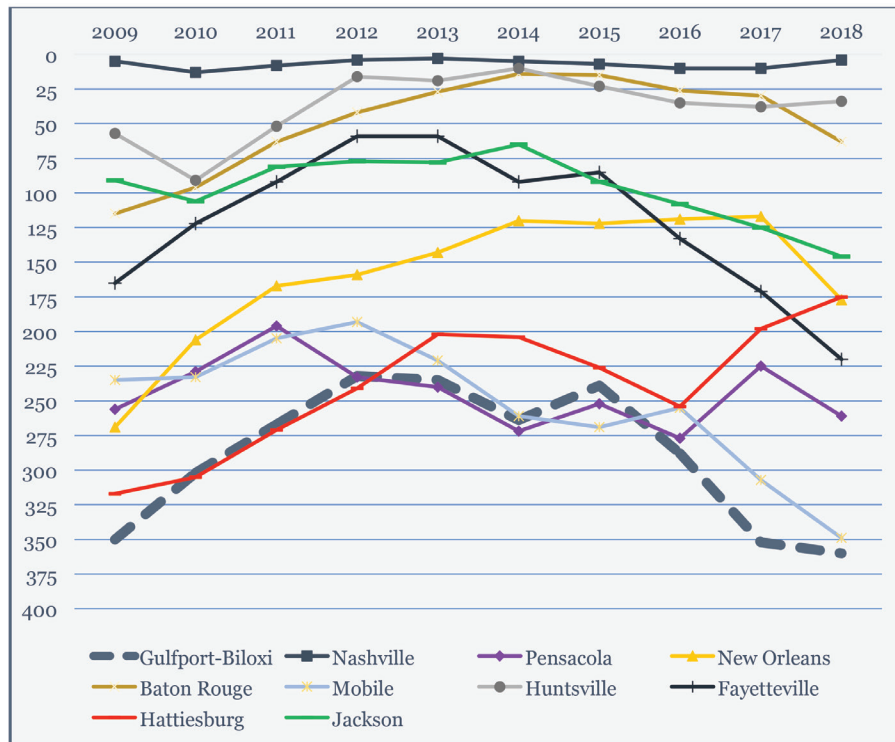
TABLE 2
Cost of Living Index

GULFPORT- BILOXI- PASCAGOULA, MS	87.1
HATTIESBURG, MS	89.7
JACKSON, MS	90.8
MOBILE, AL	91.5
LAFAYETTE, LA	92.8
FAYETTEVILLE-SPRINGDALE-ROGERS, AR-MO	94.6
NASHVILLE-DAVIDSON-MURFREESBORO--FRANKLIN, TN	95.9
HUNTSVILLE, AL	96.8
BATON ROUGE, LA	99.3
NEW ORLEANS-METAIRE, LA	100.4
PENSACOLA-FERRY PASS-BRENT, FL	100.9

Source: EMSI based upon quarterly published data from the Council for Community and Economic Research

ECONOMY

The Gulf Coast Region's overall economy is less competitive in terms of overall growth in size and quality of the economy as measured by worker earnings; how the economy is behaving; and dependence on government social assistance. This is measured by Policom Corporation's 2018 Economic Strength Rankings using a combination of 23 economic indicators. For more than twenty years, Policom Corporation has ranked communities according to areas of the economy sensitive to economic changes using a multivariate economic analysis of metropolitan and micropolitan statistical areas. Gulfport-Biloxi-Pascagoula MSA underperformed much of the nation with a rank of 360 out of 382 metro areas. Comparably, Nashville ranked fourth which was highest of the comparison cities (see Figure 1).

Figure 1. Policom Rankings 2009 to 2018

Policom Strength Rankings are grouped into three groups that include the following: overall growth in size and quality of the economy based upon what people earn; reflection of how the economy is behaving; and negative factors on the economy (see Figure 2).

Figure 2. 23 Policom Indicators for Strength Ranking**Group 1**

Overall growth in size and quality of the economy based upon what people earn.

- All workers-Earnings, Jobs, Wages
- Per Capita- Total Worker Earnings; Personal Income; Earnings by Residences
- Earnings by Place of Residence
- Wage & Salaried Workers-Earnings, Jobs, Wages

**Group 2**

Reflection of how the economy is behaving. Small businesses and the construction and retail industries are extremely reactive to the 'flow of money' coming into an area, and they typically grow or decline in direct proportion to the condition of the economy.

- Non-Farm Proprietors - Worker Earnings, Jobs, Wages
- Construction-Worker Earnings, Jobs, Wages
- Retail-Worker Earnings, Jobs, wages

**Group 3**

Negative factors on the economy

- Per Capita Income Maintenance (Welfare)
- Per Capita Medical Assistance for the Poor (Medicaid)

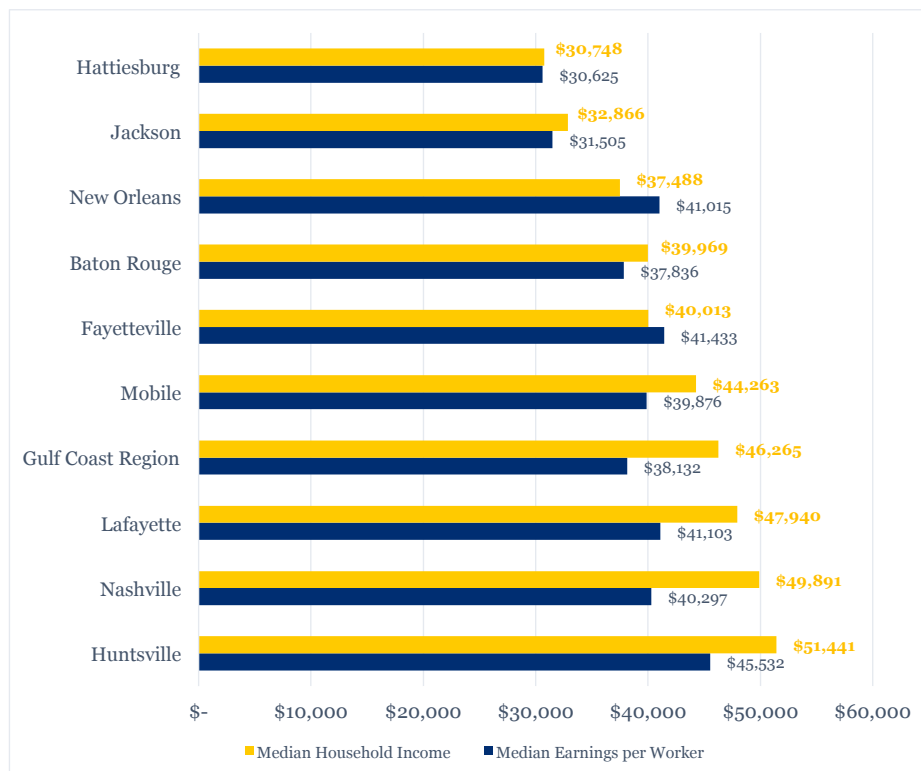
INCOME

The Gulf Coast Region outperforms the two other Mississippi comparison cities (Jackson and Hattiesburg) in the categories of median earnings per worker and median household income. The aspirational goal should be to benchmark the highest performing city of Huntsville, Alabama. Huntsville's highest concentration of jobs by industry sector (measured by location quotient of 2.22) is Professional Technical and Scientific Services (NAICS code 54), which has grown by 10 percent from 2013 (31,424 jobs) to 2018 (34,662 jobs), has an average earnings of \$107K. On the Mississippi Gulf Coast, this industry sector (LQ of 0.51) has average earning of \$69K annually, which has decreased from 5,628 to 5,585 jobs during the same period of time.

The Gulf Coast Region has the opportunity to build upon jobs in the region because of innovation employers such as The University of Southern Mississippi, NASA Stennis Space Center, Chevron, Ingalls Shipbuilding, Naval Research Lab, and others. The Gulf Coast Region also has the fourth highest median household income out of all of the comparison cities (\$46,265), falling behind Huntsville (\$51,441), Nashville (\$49,891), and Lafayette (\$47,940). This data shows that the Gulf Coast Region residents generally enjoy a financially comfortable lifestyle. In terms of median earnings per worker, the Gulf Coast Region (\$38,132) ranks seventh among the comparison cities, falling between Mobile (\$39,876) and Baton Rouge (\$37,836). This illustrates the region's need to create more high-paying jobs for its residents (see Chart 1).

CHART 1

Income and Earnings Comparative (2018)



Source: Town Charts

LABOR FORCE PARTICIPATION & UNEMPLOYMENT

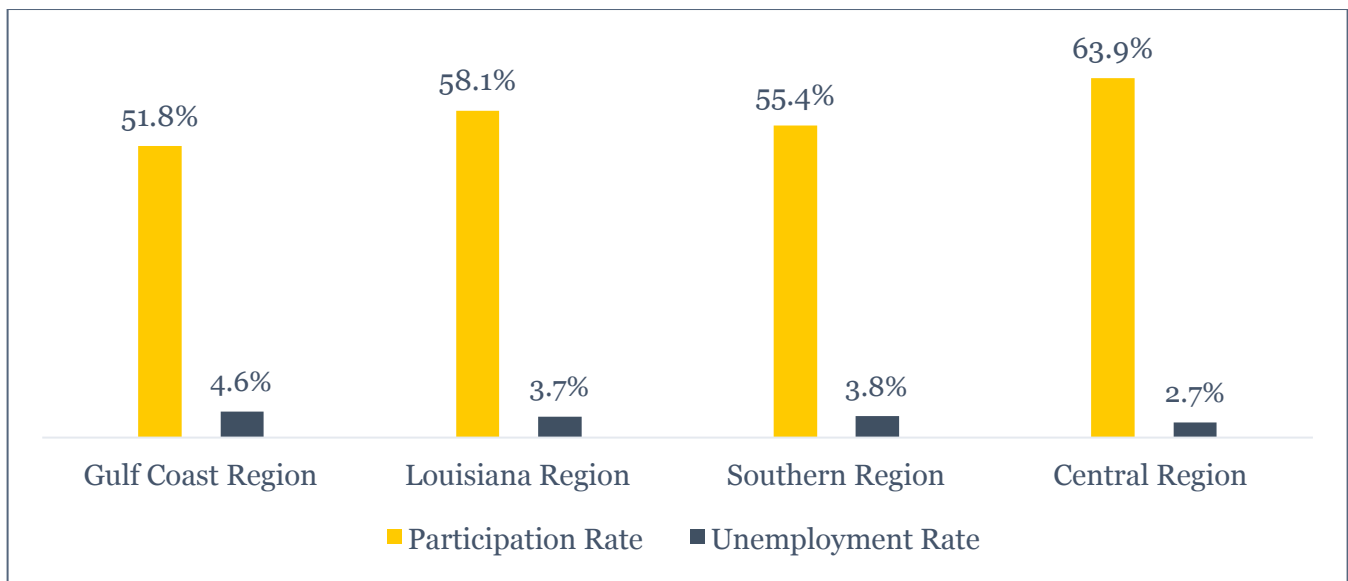
The Gulf Coast Region's labor force participation rate lags behind the regions with 51.8 percent (see Chart 2). Labor force participation rate is defined as the percentage of people available for work as compared to the total population between 16 and 64 years old. The lack of participation in the workforce should be a concern for local leadership because it indicates a higher percentage of individuals are simply not looking for work or have left the workforce altogether for a variety of reasons. To simplify 10 individual comparison charts to the Gulf Coast Region, the other communities were grouped into three geographic regions:

- Louisiana Region is Baton Rouge, LA; New Orleans, LA; and Lafayette, LA
- Southern Region is Mobile, AL; Pensacola, FL; and Hattiesburg, MS
- Central Region is Huntsville, AL; Fayetteville, AR; Nashville, TN; and Jackson, MS

The unemployment rate represents jobless individuals who are actively seeking employment. The Gulf Coast Region's labor force participation rate ranks lowest among the comparison regions (51.8 percent) and the unemployment rate ranks highest among the comparison regions (4.6 percent) (see Chart 2). This illustrates the region's opportunity to promote labor force participation among its citizens as well as the ability to fill jobs, if they were to be created. The Southern Region most closely compares to the Gulf Coast Region in terms of labor force participation (55.4 percent) and unemployment rate (3.8 percent). The Central Region has the highest labor force participation rate (63.9 percent) and lowest unemployment rate (2.7 percent).

CHART 2

Labor Force Participation Rate vs. Unemployment Rate (2017)



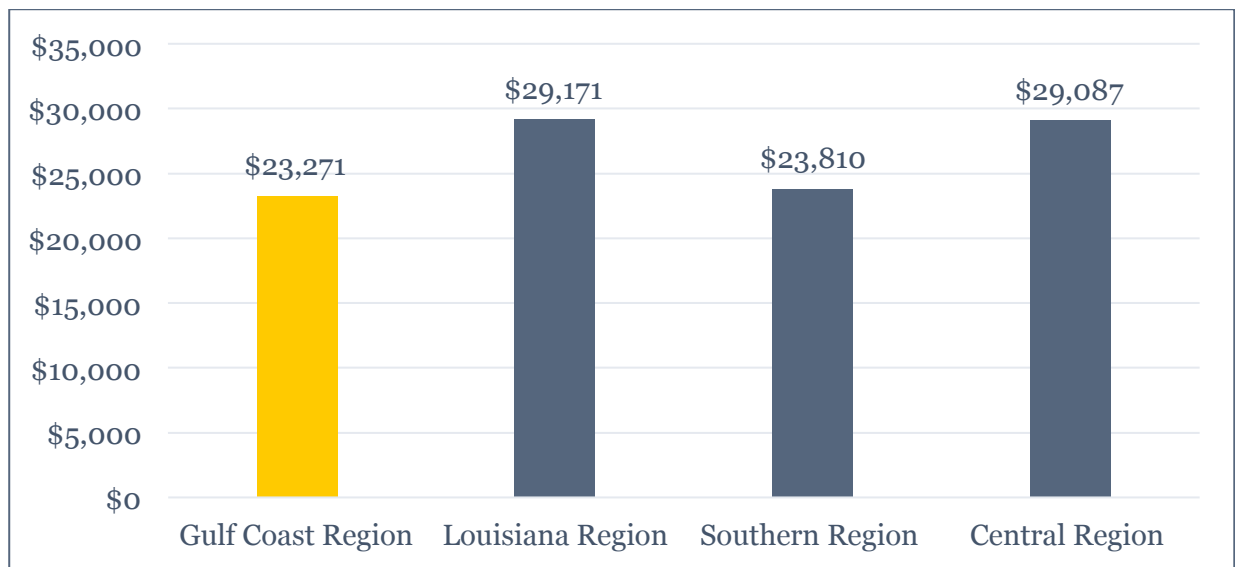
Source: EMSI, 2017

PER CAPITA INCOME

Per capita income is defined as the total value of goods and services produced in one year divided by the total population for a region (Sperling's Best Places). The Gulf Coast Region has a per capita income of \$23,271 (see Chart 3), which compares most closely with the Southern Region (\$23,810). The region with the highest per capita income is the Louisiana Region (\$29,171) followed closely by the Central Region (\$29,087). Because the Gulf Coast Region has a lower per capita income, this could provide the opportunity to produce more goods and services within the region.

CHART 3

Per Capita Income



Source: Sperling's Best Places



PLACE

America's coastline counties—those directly adjacent to the Atlantic Ocean, Pacific Ocean, or Gulf of Mexico—were home to about 94 million people in 2016 or about 29 percent of the total U.S. population. People want to live near coastlines. The Gulf Coast Region's population of 397,226 represents 13.2 percent of Mississippi's total population, second only to the capital city of Jackson. The population of coastline counties in the Gulf of Mexico region increased by more than 3 million people, or 24.5 percent between 2000 and 2016, the fastest growth among coastline regions. By comparison the United States as a whole grew by 14.8 percent over the same period (Cohen, 2018).

Resonance Consulting in *World's Best Cities* describes *Place* as the "perceived quality of the natural and built environment of a location". Factors evaluated deal specifically with air and land quality, *Superfund* and *Brownfield* sites, weather, safety, recreation and amenities. In an economy where individuals are more mobile and able to relocate to a different community for work, *Place* becomes an important factor in attracting talent. Lifestyle choices are becoming increasingly relevant with individuals choosing career locations that fit their perceptions of a place conducive to both work and play.

Coastal areas are six times greater in population density than inland counties in terms of population per square mile and are projected to continue growing over the next few years. The coastal areas are centers for trade and commerce and have been among the most sought-after places to live not only in the U.S. but the world. According to the United Nations *Atlas of Ocean*, about 44 percent of the world's population lives within 93 miles of a coastline (Nature World News).

PLACE SUMMARY

Of the comparison regions, the Gulf Coast Region has a competitive advantage in having a coastline appealing to population growth. It ranks above average in air quality, land quality and safety. However, the region lags slightly below average in terms of amenities offered. With the highest number of casinos in the state, the Gulf Coast Region showcases itself as the vacation destination of Mississippi.

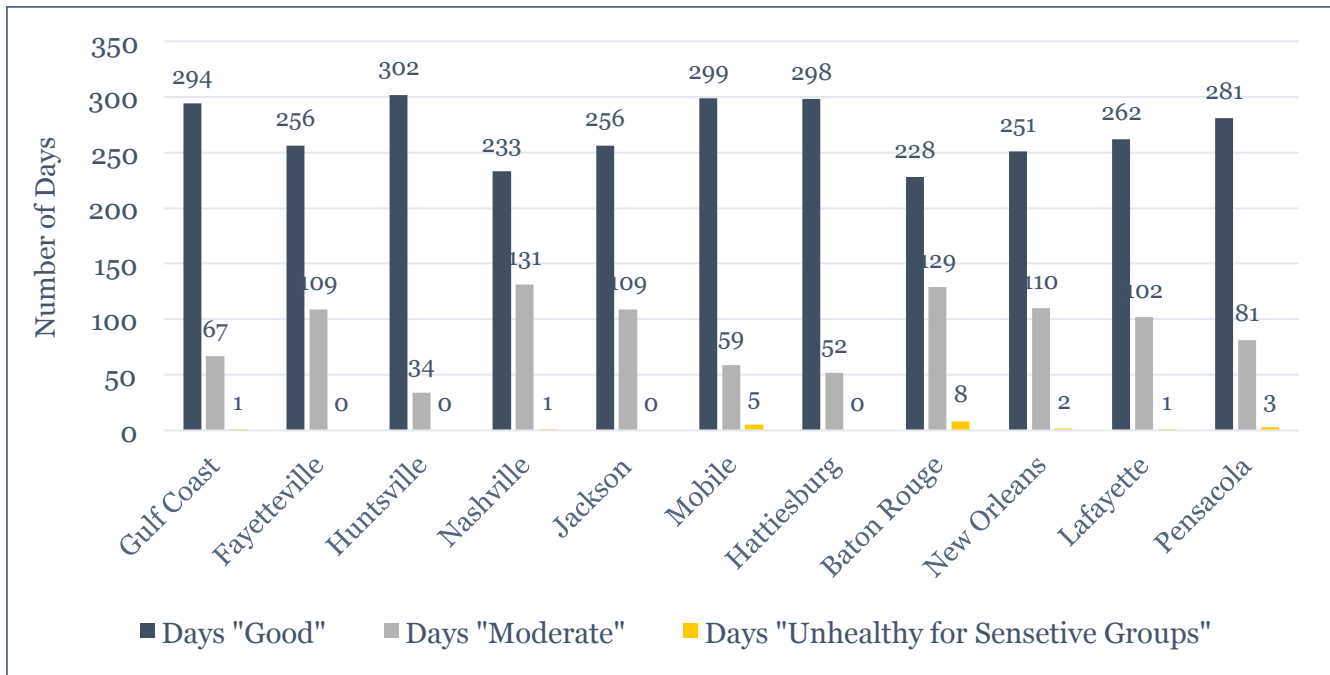
ENVIRONMENT

Air Quality

Outdoor air quality is a valuable resource for current and future generations because it affects human health and shields the earth from harmful radiation. The Environmental Protection Agency (EPA) measures air quality by a Daily Air Quality Index grade, ranging from "Good" to "Very Unhealthy". The Gulf Coast Region ranked fourth out of 11 for "Good" days (see Chart 4).

CHART 4

Air Quality (2017)



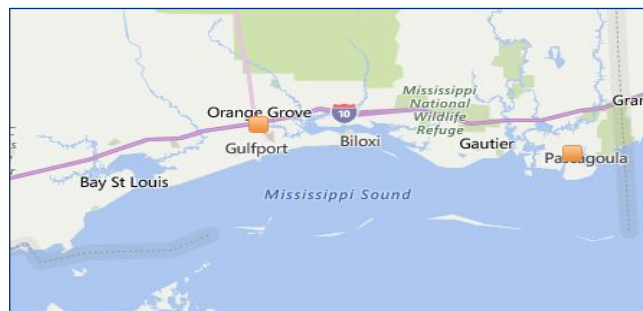
Source: EPA Air Quality Index, 2017

Land Quality

Protection of the land through conservation and other environmental management practices is an important aspect of Place. It's difficult to compare metro areas' land quality. However, the Environmental Protection Agency (EPA) tracks the number of Superfund and Brownfield sites identified for cleanup. EPA works with communities to accelerate cleanup and to promote economic revitalization of contaminated land referred to as Superfund sites. The Gulf Coast Region has only two environmental Superfund sites (one in Harrison County and one in Jackson County) (see Map 1 and Chart 5). Pensacola has the greatest number among the comparative metros with six Superfund sites.

MAP 1

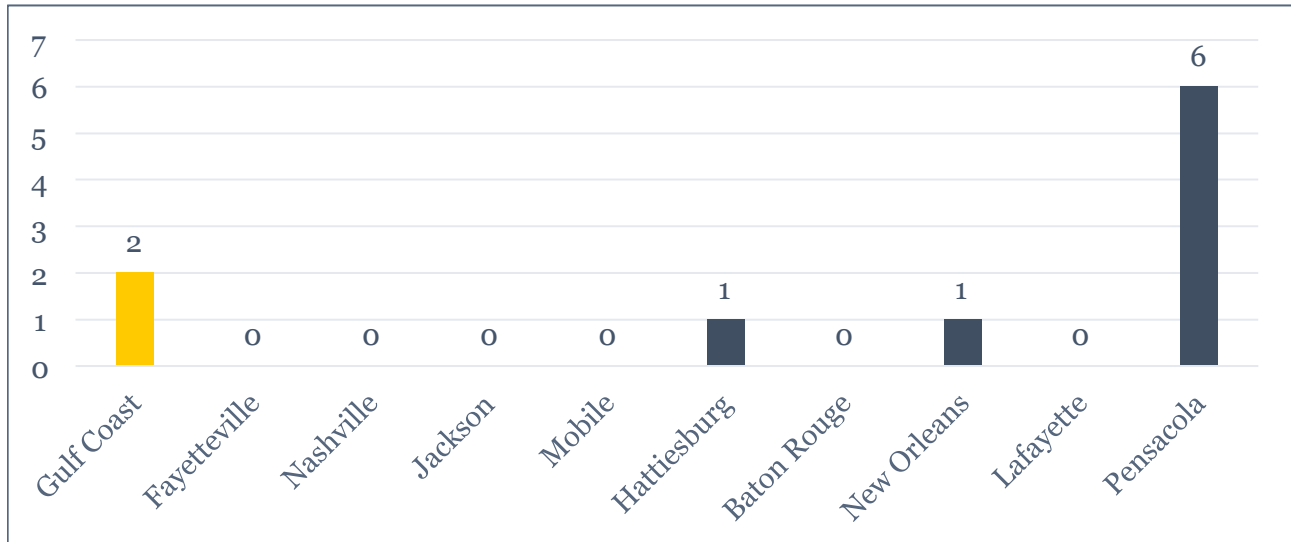
Superfund Site Locations



Source: Environmental Protection Agency

CHART 5

Number of Superfund Sites

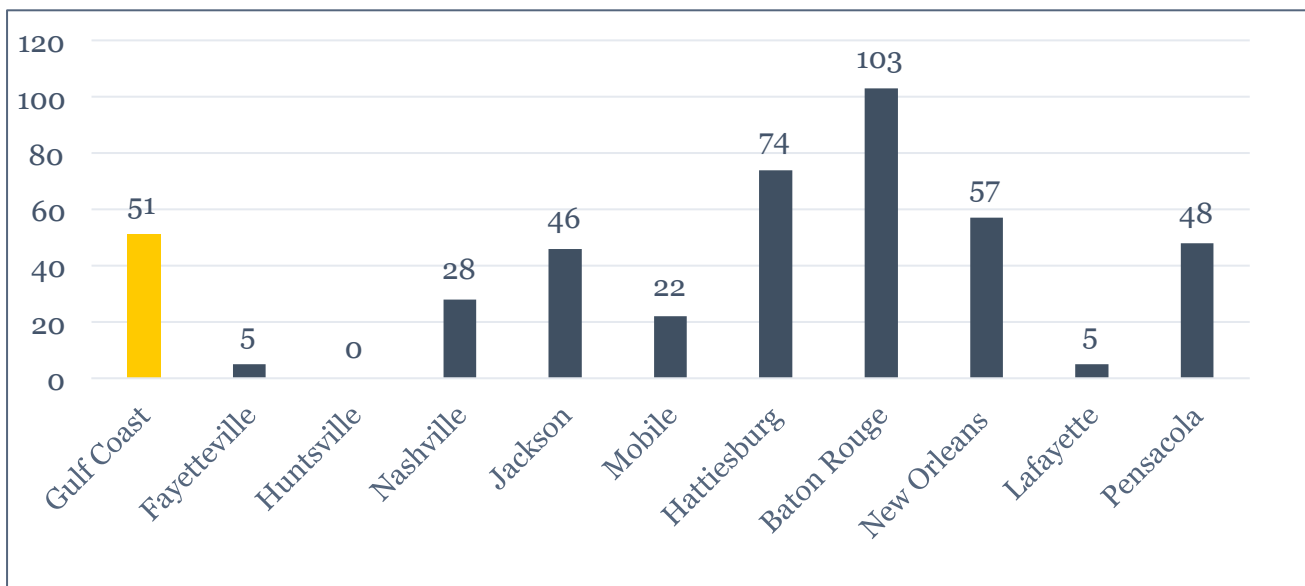


Source: Environmental Protection Agency, Cleanups in My Community

Another method of analyzing land quality is by measuring the number of Brownfield sites. A brownfield site is property classified as being contaminated with a hazardous substance complicating reuse of the land (EPA). The Gulf Coast Region ranks eighth out of eleven among the comparison regions (see Chart 6).

CHART 6

Number of Brownfield Sites 2018



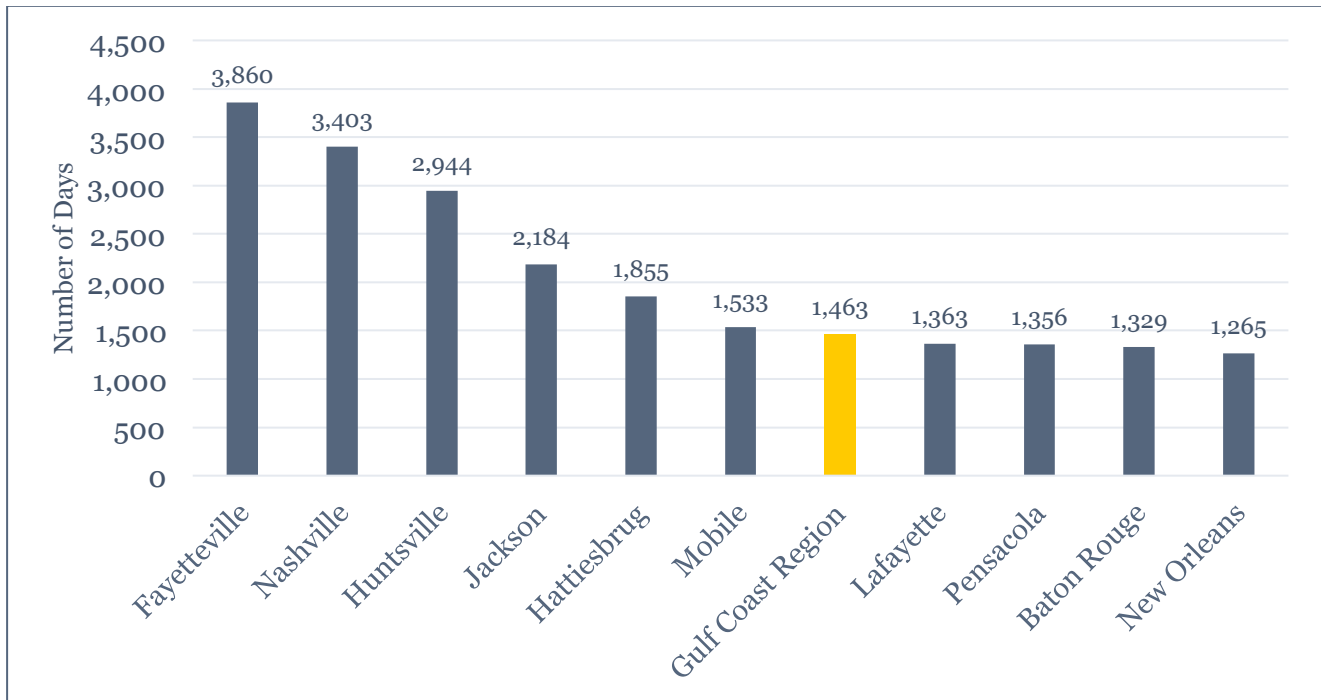
Source: Environmental Protection Agency, Cleanups in My Community

WEATHER

The Gulf Coast Region is competitive in having the fifth lowest combined cooling degree days and heating degree days, while Fayetteville is least competitive with the highest energy requirements. Many climatologists use "heating degree days" and "cooling degree days" as a measure of how much energy is required for a residence or business during the year. Degree days, according to The National Weather Service, are the difference between the daily temperature mean, (high temperature plus low temperature divided by two) and 65°F. If temperature mean is below 65 degrees the result is heating degree days (HDD), but if the temperature mean is above 65 degrees the result is cooling degree days (CDD). Heating degree days and cooling degree days are measurements designed to further quantify the demand for energy needed to heat or cool a building. A 20-year (1997-2017) average heating and cooling in a region has a direct impact on utility expenses for residences and businesses. Chart 7 shows the average number of heating days and Chart 8 shows the average cooling degree days for the comparison regions over a 20-year time frame. Chart 9 shows the combined heating and cooling days. Lafayette, LA has the lowest combined CDD and HDD energy requirements.

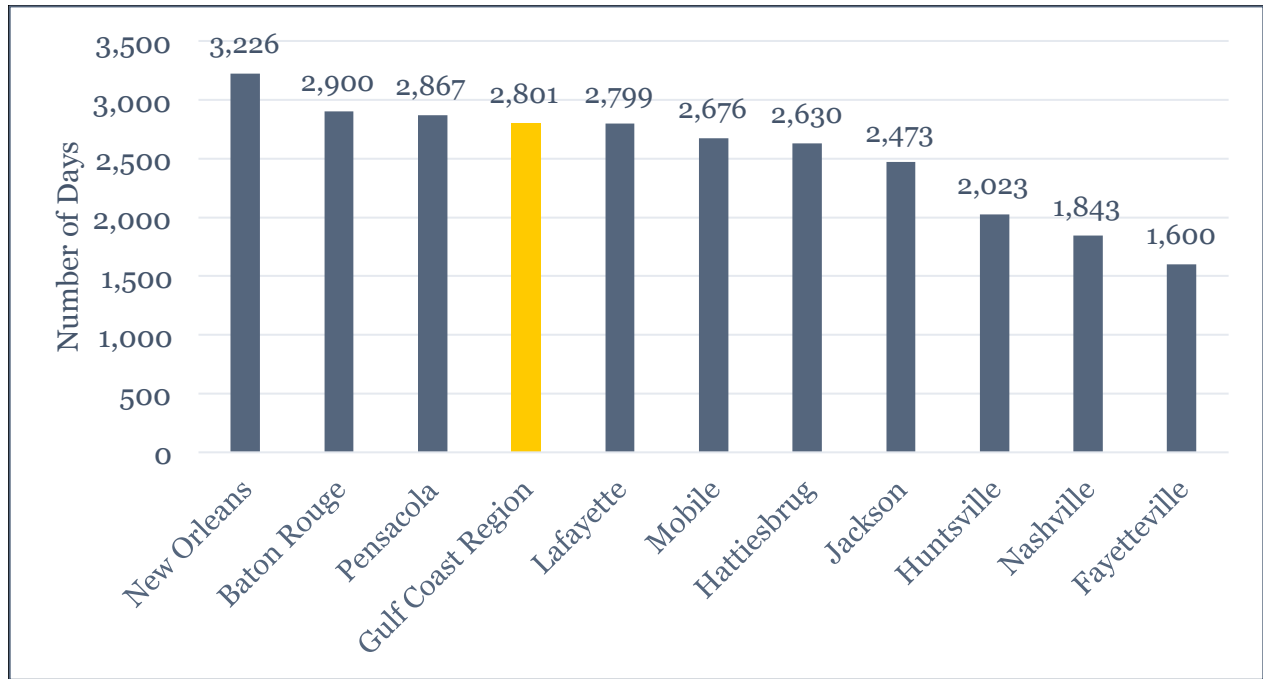
CHART 7

Heating Degree Days - 20-Year Average (1997-2017)



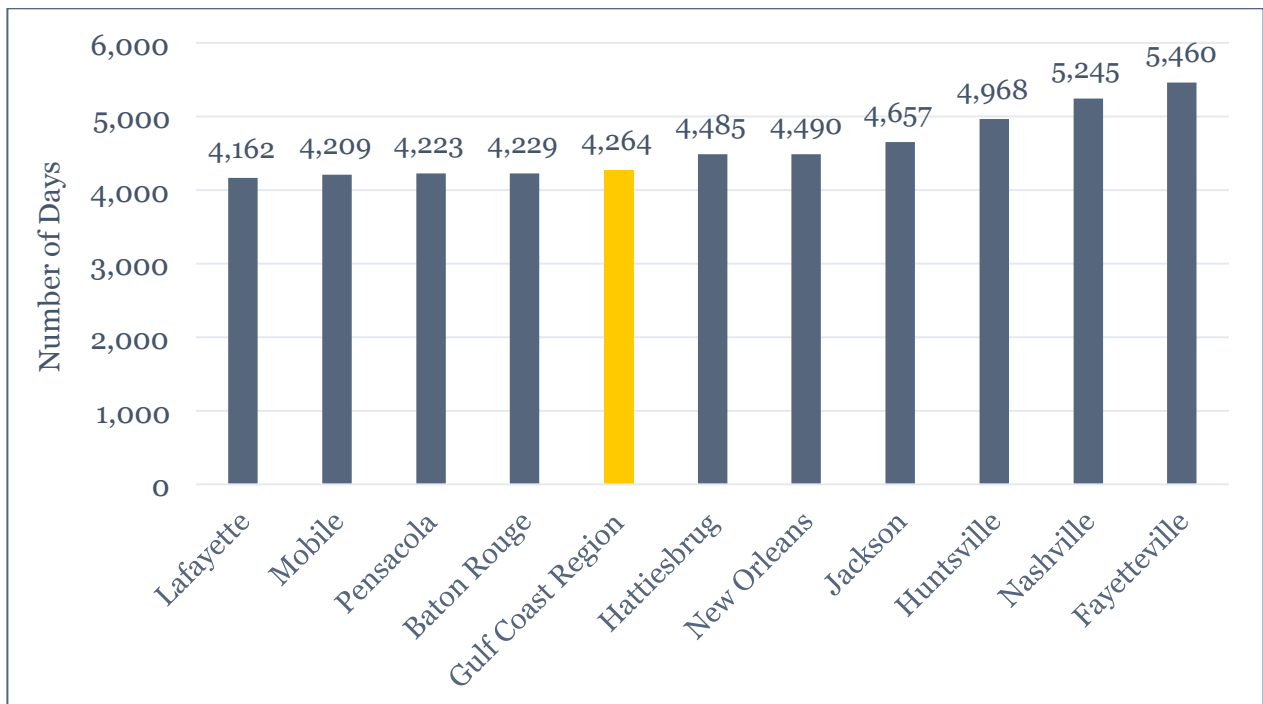
Source: NOAA Regional Climate Center, XM Acis2

CHART 8

Cooling Degree Days - 20-Year Average (1997-2017)

Source: NOAA Regional Climate Center, XM Acis2

CHART 9

Combined Total Heating and Cooling Degree Days - 20-Year Average (1997-2017)

Source: NOAA Regional Climate Center, XM Acis2

SAFETY

The Gulf Coast is a relatively safe region. Safety relates to the control of and presence of crime in an area. Crime rates are one of the more objective ways to measure public safety. Communities along the Gulf Coast Region reported better than average violent crimes rates, at a rate of 6.15 per 1,000 residents in 2016 as compared to a low of 3.13 to a high of 11.26 among the other regions (see Chart 10). The Gulf Coast Region property crimes of 46.03 per 1,000 residents ranked slightly better than average among the comparison communities.

CHART 10

Violent and Property Crime Data 2016 (per 1,000 Residents)



Source: Neighborhood Scout, 2016

Note: Data on Neighborhood Scout is self-reported by local law enforcement agencies

* Average for the three counties in the Gulf Coast Region

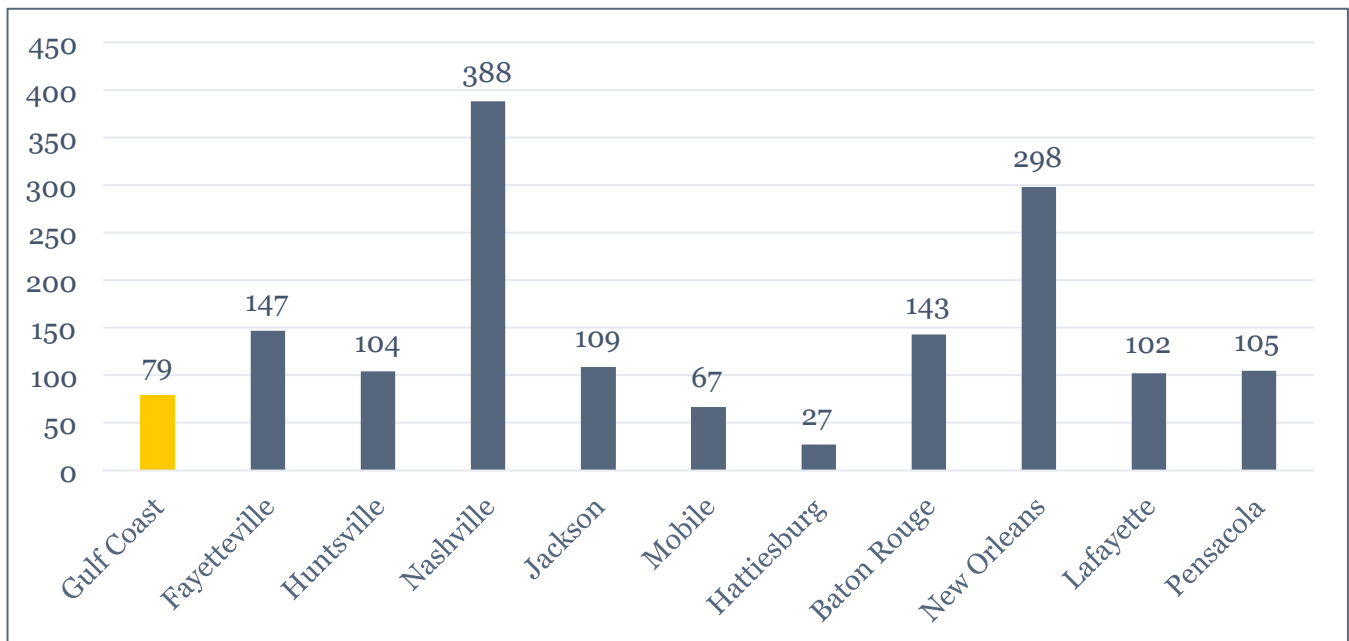
In 2004, the Mississippi Law Enforcement Accreditation Commission (MSLEAC) was created as a statewide accreditation program for law enforcement agencies. The Commission encourages law enforcement agencies to become accredited, citing benefits including controlled liability insurance cost, a stronger defense against lawsuits and citizen complaints, greater accountability within the agency, strong support from local government, and increased community advocacy. Although it was beyond the scope of this study to determine the number of accredited law enforcement agencies that exist along the Mississippi Gulf Coast, a high accreditation percentage is worthy of touting to those seeking safe places to live and work.

RECREATION: PARKS AND OUTDOOR FACILITIES

The Gulf Coast Region offers 79 parks and outdoor facilities (NAICS 7139-Other amusement and recreation industry). This includes operating outdoor or indoor facilities and providing services that enable patrons to participate in sports and recreational activities. Examples of establishments in this industry group are golf courses, skiing facilities, marinas, recreational, sports and fitness centers, and bowling centers. These facilities rank Gulf Coast ninth out of 11 of competitive communities (see Chart 11).

CHART 11

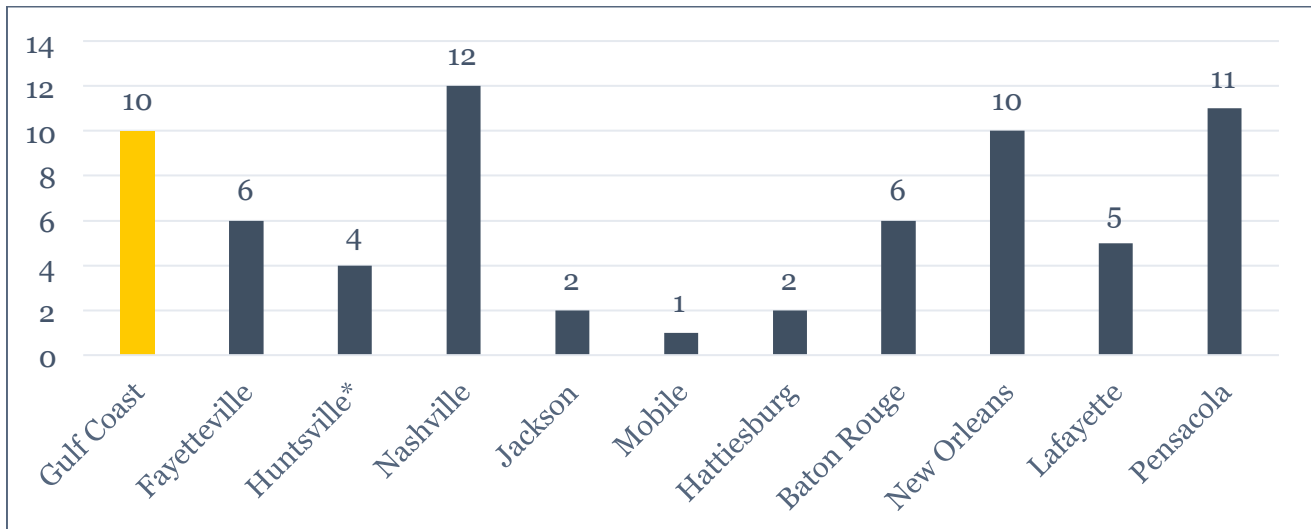
Number of Recreation Facilities



Source: EMSI, 2018

The Gulf Coast Region offers 10 RV Parks and Campgrounds (NAICS 721211). This ranks the Gulf Coast tied for seventh with New Orleans among comparative communities (see Chart 12). North of the Gulf Coast Region, there are dozens of campgrounds in and around Desoto National Forest, which is within a one-hour drive from the Gulf Coast Region.

CHART 12

RV Parks and Campgrounds

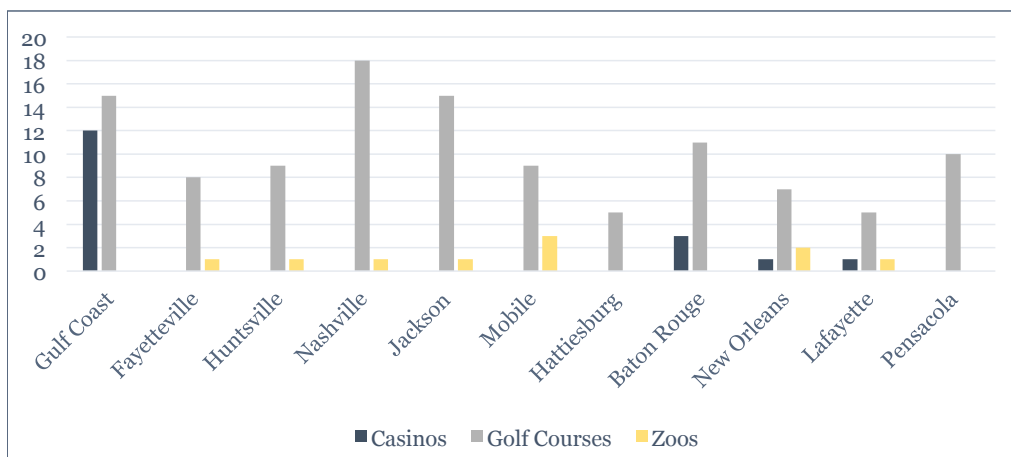
Source: EMSI, 2018

*Note: Huntsville data pulled from Huntsville.org

AMENITIES

The Gulf Coast Region depends on a thriving casino industry to bolster tourism numbers. Many of the casinos offer events outside of gaming, including music venues. The Mississippi Gulf Coast Coliseum in Biloxi hosts concerts and events throughout the year. The Gulf Coast Region hosts many festivals throughout the year, including car shows, Mardi Gras celebrations, arts and craft shows and music festivals. The Gulf Coast Region ranks the highest in number of casinos and third in number of golf courses but does not have a zoo (see Chart 13).

CHART 13

Casinos, Golf Courses and Zoos

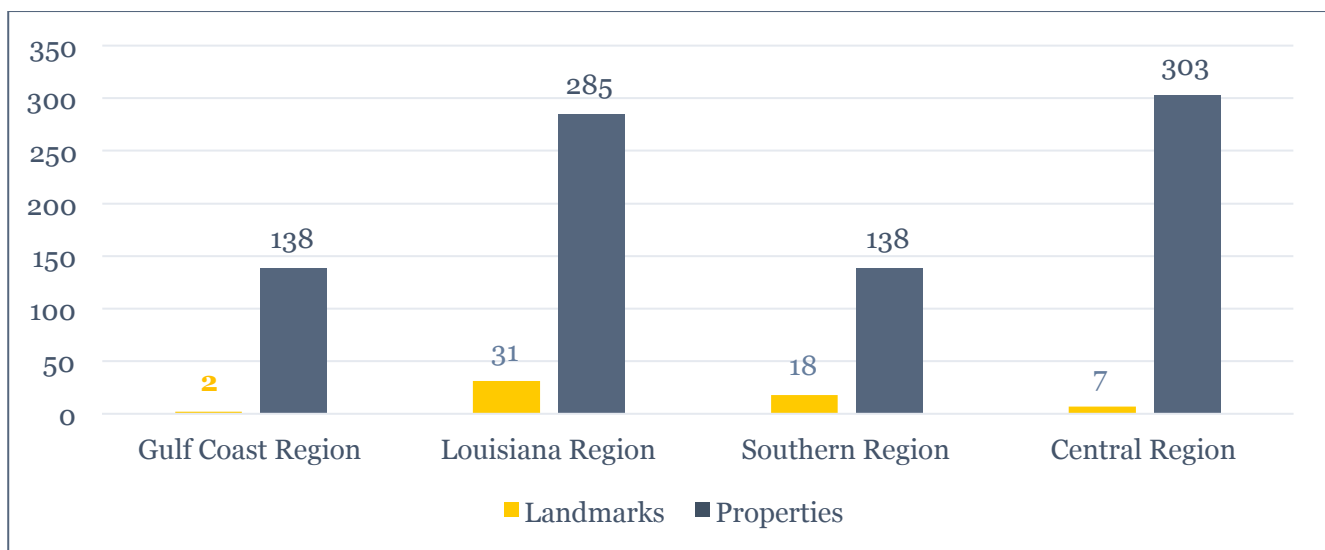
Source: Statebook

The National Register defines Historic Landmarks as a historic property evaluated and found to have significance at the national level and designated as such by the Secretary of the Interior. Historic Properties are defined as an area of land containing a single historic resource or a group of resources and constituting a single entry in the National Register of Historic Places.

The Gulf Coast Region has the lowest combined total of historic landmarks and properties based on the National Register with a total of 140 sites (see Chart 14). The two landmarks on the Gulf Coast Region are Beauvoir (Reference #71000448) and the Rocket Propulsion Test Complex (Reference #85002805). The Louisiana, Southern and Central Regions have a total of 316, 156 and 310, respectively. There is an opportunity for the Gulf Coast Region to add more historic sites to the National Register in an effort to increase the marketability of the region's history to tourist.

CHART 14

Landmarks and Properties



Source: National Register of Historic Places 2017

For spectator sports, major league and minor league venues offer high-quality attractions. Additionally, NCAA Division I Athletic venues attract visitors and residents and add to a community's Place Making and Talent Attraction. The Gulf Coast Region is home to the Biloxi Shuckers minor league baseball team. Of the 11 regions, only New Orleans and Nashville offer major league sports (see Table 3).

Of the comparison regions, the Gulf Coast is the only region to offer sports betting. Mississippi is one of seven states to officially legalize sports betting, and the Gulf Coast Region, with its numerous casinos, has begun to market itself as the premier sports book in the state.

TABLE 3

Spectator Sports

	MAJOR LEAGUE	MINOR LEAGUE	NCAA DIVISION I
GULF COAST	0	1	0
FAYETTEVILLE	0	0	1
HUNTSVILLE	0	1	2
NASHVILLE	2	2	2
JACKSON	0	1	1
MOBILE	0	1	1
HATTIESBURG	0	0	1
BATON ROUGE	0	0	1
NEW ORLEANS	2	1	1
LAFAYETTE	0	0	1
PENSACOLA	0	1	0

Source: Google



PRODUCT

The category of Product is defined as liveliness and culture, airline connectivity, quality attractions, higher education, and internet infrastructure. The quantity, quality and reputation of the community's Product matters to the innovative and creative workforce, so maintaining these are paramount to successfully developing place making and talent attraction. Although institutions, infrastructure and attractions can require significant investments for public good, they are significant factors for residents and visitors.

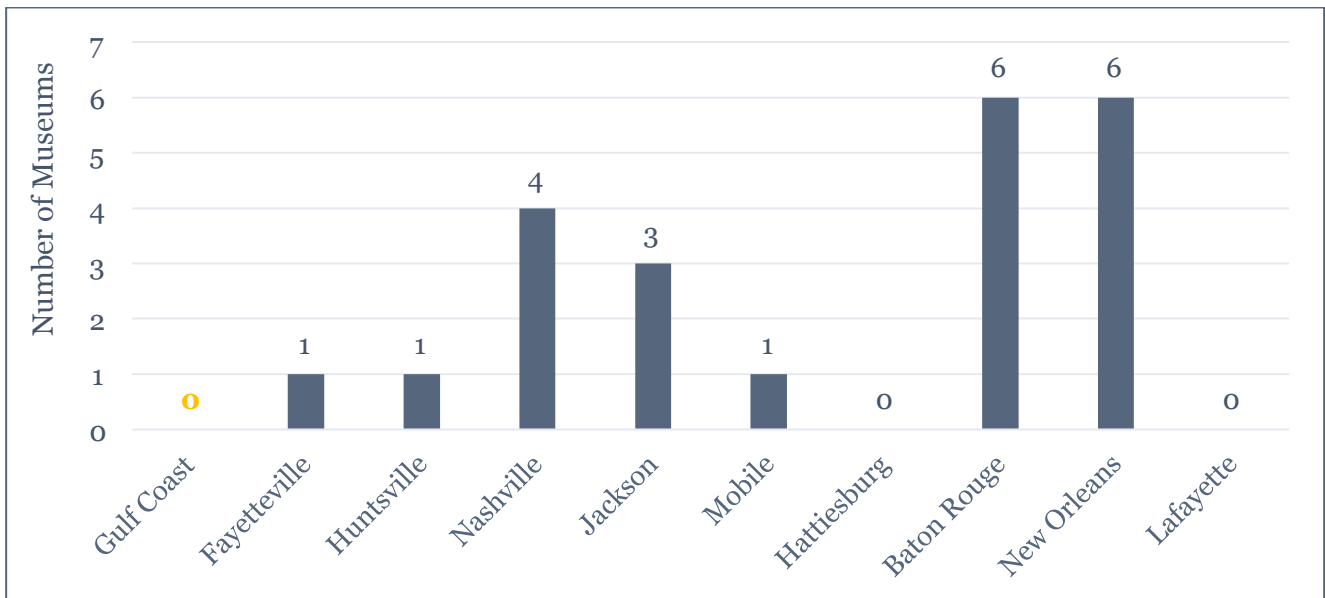
PRODUCT SUMMARY

Cultural experiences, entertainment, access to both regional and national flights, higher education and high-speed internet are all present throughout the Gulf Coast Region and competitive for its population size. The combination of casinos and ocean-related markets are significant influencers of what makes the Mississippi Gulf Coast unique from other regions studied.

LIVELINESS AND CULTURE

The Mississippi Gulf Coast Region is one of only three locations in Mississippi and 49 national areas designated as a National Heritage Area. A National Heritage Area is acknowledged by Congress as a place where natural, cultural, historic and scenic resources combine to form a cohesive, nationally distinctive landscape arising from patterns of human activity shaped by geography. Of the 11 regions studied, the Gulf Coast Region is the only one to be able to lay claim to being a National Heritage Area: the Mississippi Gulf Coast National Heritage Area. Fewer than 10 percent of American museums are accredited (AAM-us.org). The American Alliance of Museums (AAM) is the most widely recognized accrediting body for assurance of the quality of a museum. The Gulf Coast Region offers a wide variety of museums; however, none have completed the accreditation process. An aspirational goal would be to investigate how museum accreditation could better position the Gulf Coast museums' ability to attract workforce and population. The AAM process includes a standards-based assessment and recognition programs. Using NAICS code 711, Chart 15 shows the number of accredited museums in the study regions. The Gulf Coast, Hattiesburg and Lafayette do not have any accredited museums, while Baton Rouge and New Orleans are tied with six each.

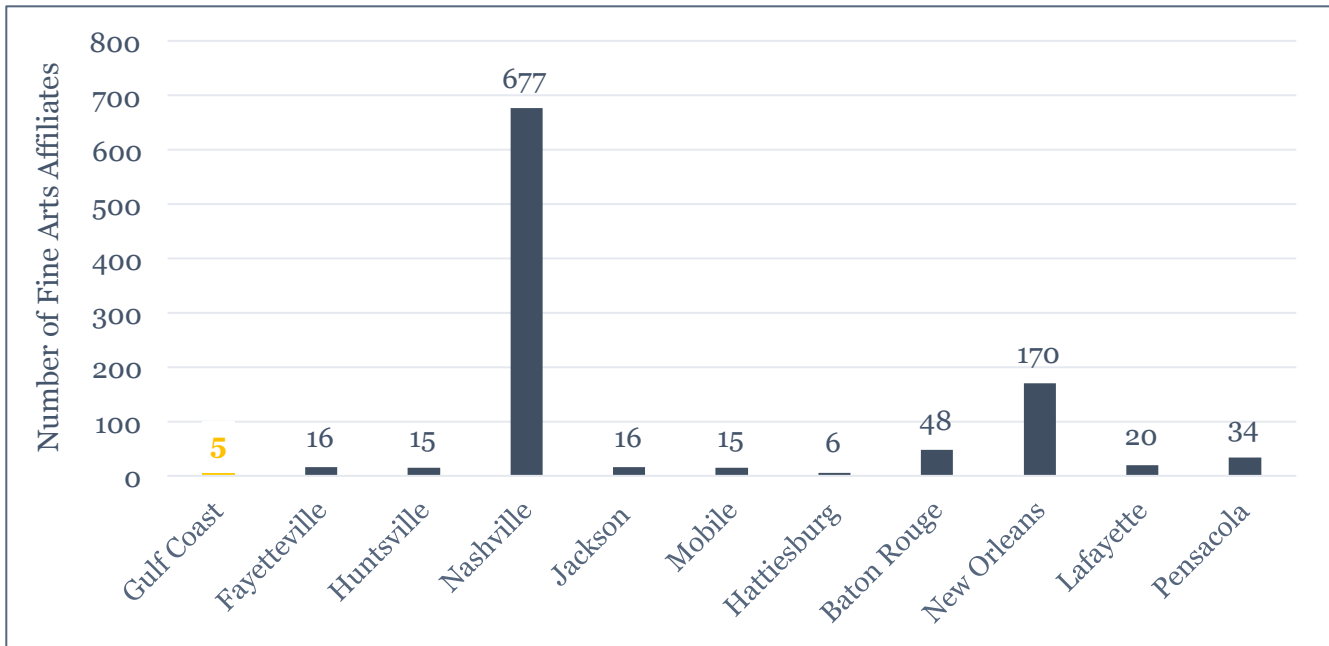
CHART 15

Accredited Museums

Source: American Alliance of Museums, 2018

The presence of fine arts is indicative of the place making and talent attraction in a community. When utilizing NAICS codes 7111-Performing Arts Centers and 7115- Independent Artists, Writers and Performers, the Gulf Coast Region has the least number of fine arts attractions (see Chart 16). Bay St. Louis, Biloxi and Gulfport each support a Little Theatre; Hancock Performing Arts Center, Trent Lott Performing Arts Center and Randolph Center also provide opportunities for citizens of the Gulf Coast Region to experience fine arts events (Gulfcoast.org).

CHART 16

Fine Arts Affiliates

Source: EMSI, 2018

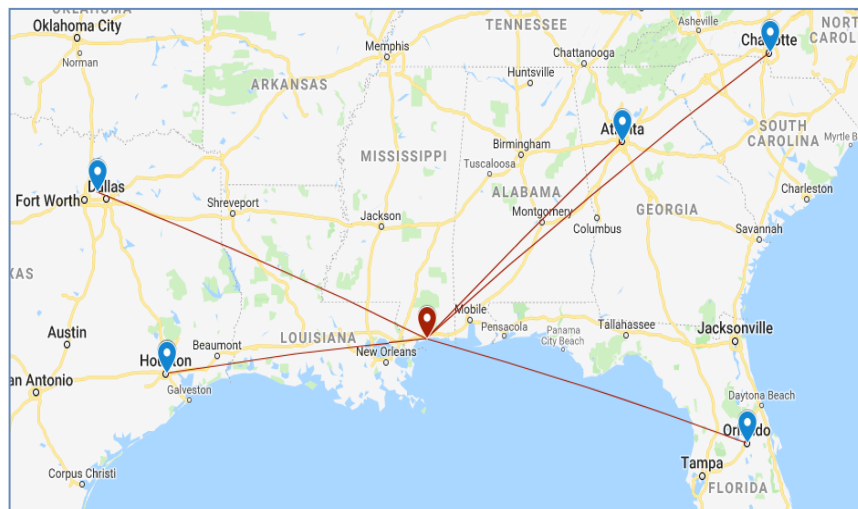
TABLE 4

Metro-Areas Direct Flight Connectivity

	NUMBER OF DIRECT FLIGHTS
NASHVILLE, NASHVILLE INTERNATIONAL AIRPORT	62
NEW ORLEANS, LOUIS ARMSTRONG INTERNATIONAL AIRPORT	49
FAYETTEVILLE, NORTHWEST ARKANSAS REGIONAL AIRPORT	16
PENSACOLA, FLORIDA-PENSACOLA INTERNATIONAL AIRPORT	14
HUNTSVILLE, ALABAMA-HUNTSVILLE INTERNATIONAL AIRPORT	9
JACKSON, MISSISSIPPI-JACKSON-MEDGER WILEY EVERS INTERNATIONAL AIRPORT	6
GULFPORT-BILOXI-PASCAGOULA INTERNATIONAL AIRPORT	5
BATON ROUGE, BATON ROUGE METROPOLITAN AIRPORT	5
MOBILE, MOBILE REGIONAL AIRPORT	4
LAFAYETTE, LOUISIANA-LAFAYETTE REGIONAL AIRPORT	3
HATTIESBURG, HATTIESBURG-LAUREL REGIONAL AIRPORT	2

GULF COAST (GPT)

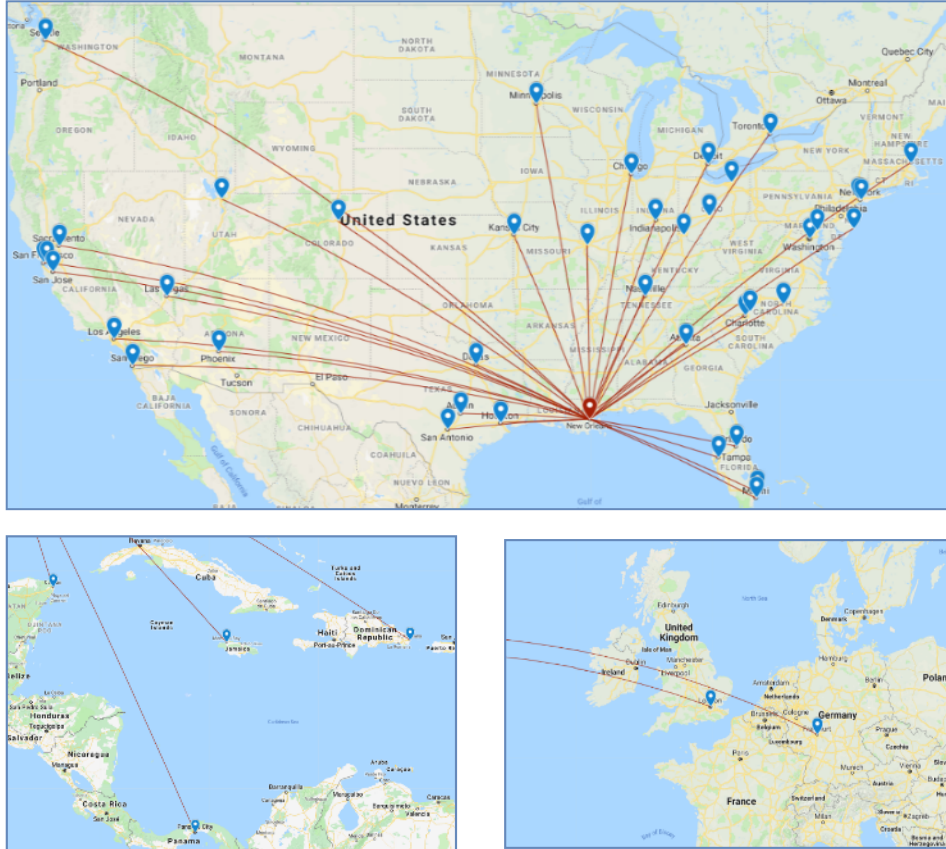
Gulfport-Biloxi International Airport services the Gulf Coast region with direct flights from Gulfport-Biloxi to Dallas/Ft. Worth, Houston, Orlando, Atlanta and Charlotte



Source: Google Maps

NEW ORLEANS (MSY)

Louis Armstrong New Orleans International Airport services the entire Southeast and offers direct flights to destinations throughout the contiguous United States as well as international flights to Toronto, Panama City, London and Frankfurt

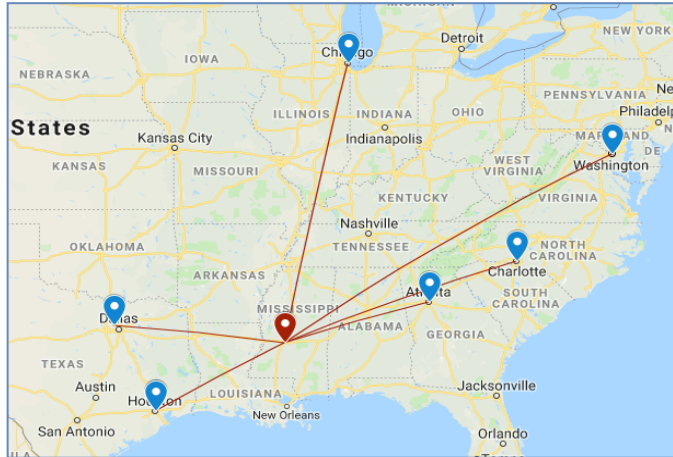


Source: Google Maps

COMPARISON CITIES

JACKSON, MISSISSIPPI (JAN)

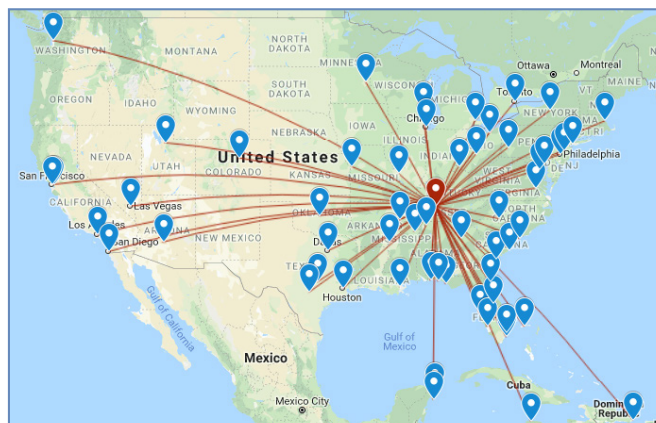
Jackson-Medger Wiley Evers International Airport services central Mississippi, with direct flights to Dallas/Ft. Worth, Houston International, Chicago, Atlanta, Charlotte and Washington, DC



Source: Google Maps

NASHVILLE, TN (BNA)

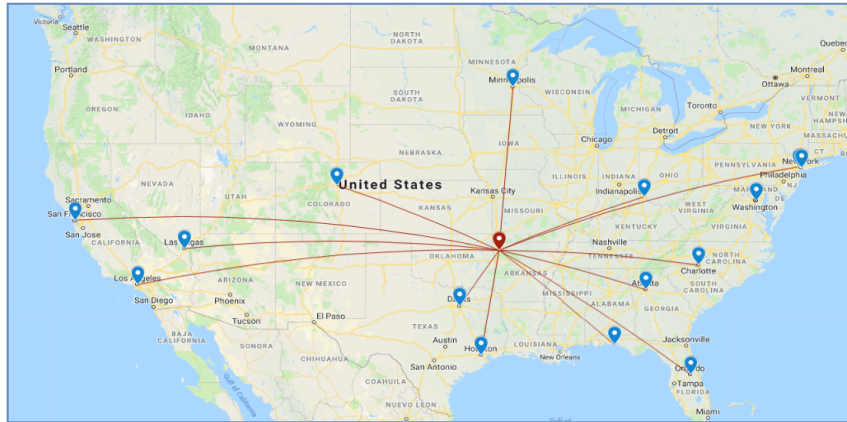
Nashville International Airport services the Southeast with direct flights to Seattle, Oakland, San Francisco, Los Angeles, San Diego, Phoenix, Las Vegas, Salt Lake City, Denver, Minneapolis, Milwaukee, Chicago O'Hare, Chicago Midway, Kansas City, St. Louis, Oklahoma City, Dallas/Ft. Worth, Dallas Love Field, Austin, San Antonio, Houston International, Houston Hobby, New Orleans, Greenville, Memphis, Tupelo, Muscle Shoals, Atlanta, Pensacola, Panama City, Destin, St. Petersburg, Ft. Meyers, Miami, Grand Bahamas, Ft. Lauderdale, Orlando, Jacksonville, Savannah, Charleston, Myrtle Beach, Charlotte, Richmond, Washington Dules, Washington Reagan, Baltimore, Philadelphia, Trenton, New York JFK, New York La Guardia, Boston, Syracuse, Pittsburgh, Columbus, Cincinnati, Cleveland, Detroit, Toronto, Cancun, Cozumel, Montego Bay and Punta Cana



Source: Google Maps

FAYETTEVILLE, AR (XNA)

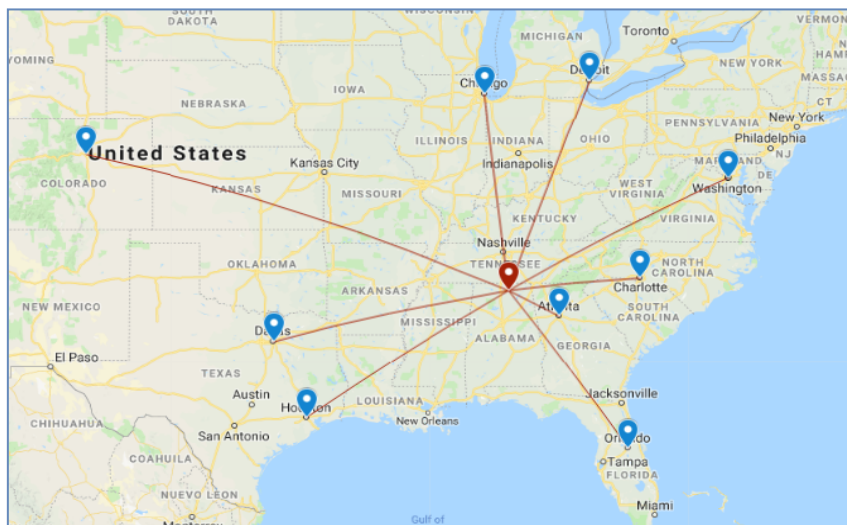
Northwest Arkansas Regional Airport services Arkansas with direct flights to San Francisco, Los Angeles, Las Vegas, Minneapolis, Denver, Chicago, Dallas, Houston, Denton/Ft. Walton, Orlando, Atlanta, Charlotte, Cincinnati, Washington, DC, New York, Newark



Source: Google Maps

HUNTSVILLE, AL (HSV)

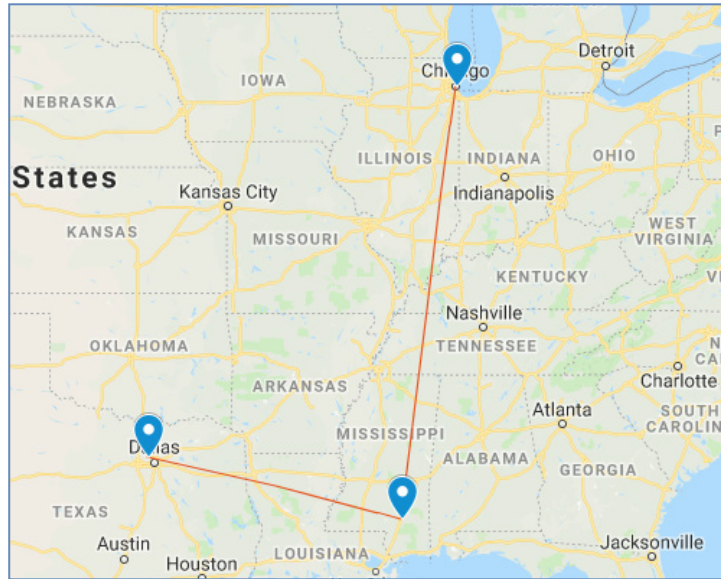
Huntsville International Airport services north Alabama with direct flights to Denver, Dallas, Houston, Atlanta, Orlando, Charlotte, Washington, DC, Chicago and Detroit



Source: Google Maps

HATTIESBURG, MS (PIB)

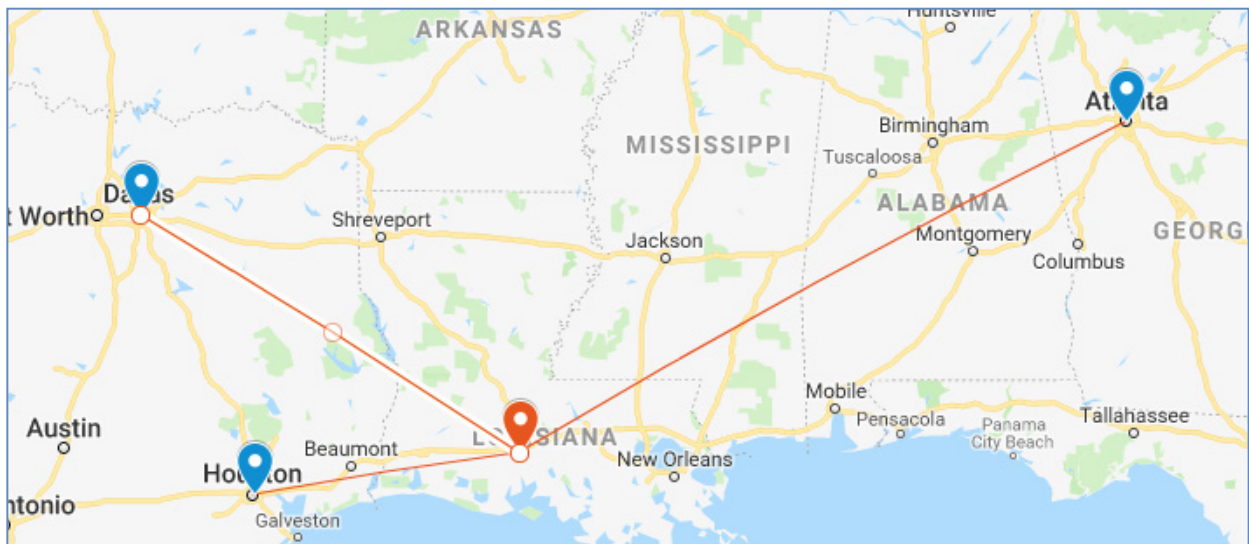
Hattiesburg-Laurel Regional Airport services the Pine Belt of Mississippi with direct flights to Dallas/Ft. Worth and Chicago



Source: Google Maps

LAFAYETTE, LA (LFT)

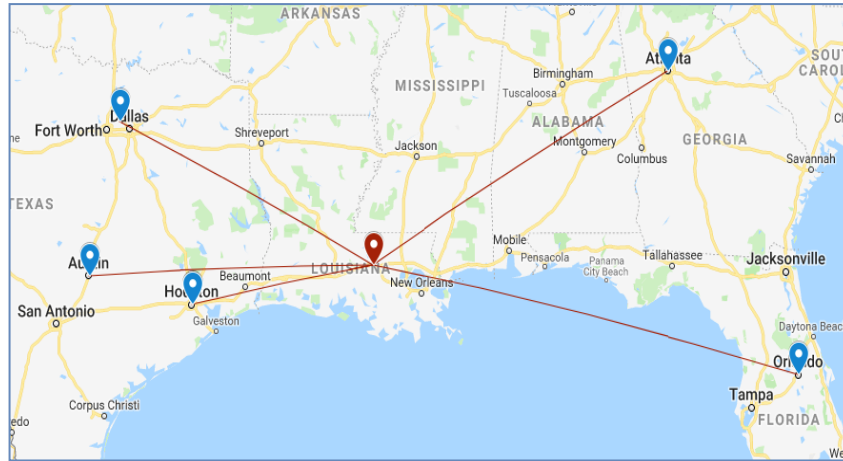
Lafayette Regional Airport services central Louisiana with direct flights to Dallas, Houston and Atlanta



Source: Google Maps

BATON ROUGE (BTR)

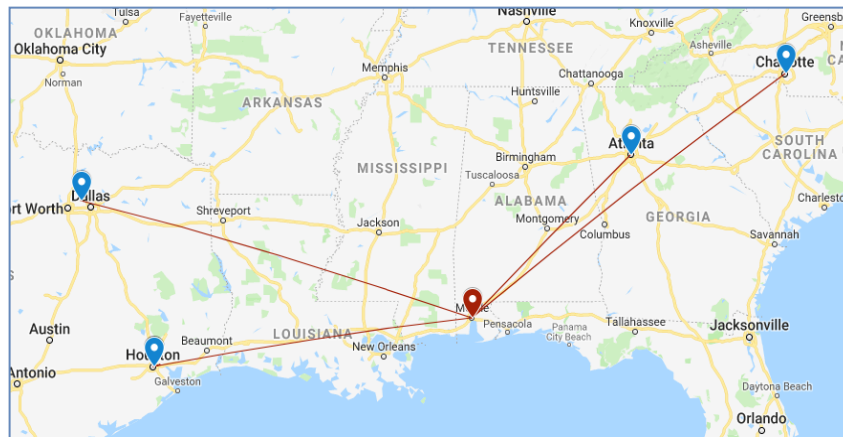
Baton Rouge Metropolitan Airport services south central Louisiana with direct flights to Dallas/Ft. Worth, Austin, Houston, Atlanta and Orlando



Source: Google Maps

MOBILE, AL (MOB)

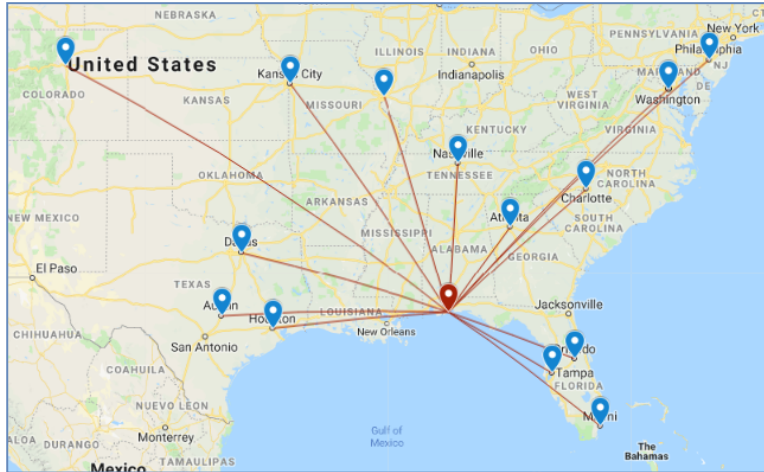
Mobile Regional Airport services southern Alabama with direct flights to Dallas, Houston, Atlanta and Charlotte



Source: Google Maps

PENSACOLA, FL (PNS)

Pensacola International Airport services northwest Florida with direct flights to Denver, Dallas, Austin, Kansas City, St. Louis, Chicago, Nashville, Atlanta, Charlotte, Washington DC, Philadelphia, Orlando, Tampa and Miami



Source: Google Maps

HIGHER EDUCATION - UNIVERSITIES

Knowledge spillovers from academia into private sector startups help drive innovation in a local area. In the past, good jobs and high incomes were tied largely to the production of low-skill, high-volume manufactured goods. In current society, good jobs and salaries increasingly come from the production of new innovations, new ideas, new knowledge, and new technologies. This shift will continue and probably accelerate in the future. This is the role that research universities play in creating Place Making and Talent Attraction. The Gulf Coast Region offers two institutions of higher learning: The University of Southern Mississippi (USM) and William Carey University, both of which operate satellite campuses on the Gulf Coast. USM's research mission has long had a presence along the Gulf Coast, and William Carey is beginning to expand its reach into healthcare-related research.



In comparison to the other communities studied, Nashville and New Orleans have the largest concentration of universities in its metro areas. "Research Universities" as defined by the Carnegie Classification of Institutions of Higher Learning as institutions that award at least 20 research/scholarship doctoral degrees. Universities classified as R1: Doctoral Universities- Highest Research Activity and R2: Doctoral Universities- Higher Research Activity are listed below (see Table 5).

TABLE 5

Colleges and Universities

	TOTAL COLLEGES/ UNIVERSITIES	CARNEGIE RESEARCH UNIVERSITIES (R1, R2)
NASHVILLE	17	VANDERBILT UNIVERSITY
NEW ORLEANS	11	TULANE UNIVERSITY
BATON ROUGE	5	LOUISIANA STATE UNIVERSITY
FAYETTEVILLE	1	UNIVERSITY OF ARKANSAS
HATTIESBURG	2	THE UNIVERSITY OF SOUTHERN MISSISSIPPI
MOBILE	3	UNIVERSITY OF SOUTH ALABAMA
JACKSON	6	JACKSON STATE UNIVERSITY
HUNTSVILLE	5	UNIVERSITY OF ALABAMA IN HUNTSVILLE
LAFAYETTE	1	UNIVERSITY OF LOUISIANA AT LAFAYETTE
GULF COAST REGION	2*	THE UNIVERSITY OF SOUTHERN MISSISSIPPI
PENSACOLA	1	UNIVERSITY OF WEST FLORIDA

Source: StateBook, Carnegie Classification of Institutions of Higher Learning

*Note: Both The University of Southern Mississippi and William Carey University have main campuses in Hattiesburg, Mississippi and therefore, are not listed in the Carnegie Classification for the Gulf Coast Region.

INTERNET INFRASTRUCTURE

Hinds County, MS has the highest percentage (64.16) of the population with access to 1,000/100 speed with at least 1 provider; the lowest ranking plunges to 1.33 percent in Orleans Parish, LA (see Table 6). The percentage of the residential population with two or more Broadband Providers in the comparison regions is over 92 percent. However, the percentage of the residential population who have access to 1,000 upload and 100 download speeds decreases drastically. In 2016, it was announced that the Gulf Coast Region would receive over 100 miles of fiber optic cable stretching from Hancock County to Biloxi. Capable of running over a gigabit per second of data, this project will greatly increase the productivity potential of the Gulf Coast Region. It was announced in late September 2018 that Diamondhead in Hancock County would be the first community to receive fiber optic internet.

TABLE 6

Percent of Population with Fixed Residential Broadband

	% OF POPULATION WITH 2 OR MORE BROADBAND PROVIDERS*	% OF POPULATION WITH ACCESS TO 1,000/100 SPEED WITH AT LEAST 1 OR MORE PROVIDER
MISSISSIPPI COUNTIES		
HANCOCK COUNTY	100%	17.86%
HARRISON COUNTY	100	21.28
JACKSON COUNTY	100	5.28
HINDS COUNTY	92.23	64.16
LOUISIANA PARISHES		
EAST BATON ROUGE PARISH	100	8.99
ORLEANS PARISH	92.77	1.33
LAFAYETTE PARISH	97.46	59.57
FLORIDA COUNTIES		
ESCAMBIA COUNTY	100	10.53
ALABAMA COUNTIES		
MADISON COUNTY (CITY OF HUNTSVILLE)	95.92	34.71
MOBILE COUNTY (MOBILE MSA)	100	12.85
ARKANSAS/MISSOURI COUNTIES		
BENTON COUNTY	92.02	8.94
TENNESSEE COUNTIES		
DAVIDSON COUNTY	97.41	43.42

Source: Federal Communications Commission. Fixed Broadband Deployment

*Note: June 2017 Broadband represented by ADSL, Cable, Fiber, Fixed Wireless, Satellite, Other with speed of 25 megabytes per second (Mbps) download, 3 Mbps upload



PROGRAMMING

Programming is measured in terms of the availability of experiences that enhance the livability of a city. Programming deals with metrics such as nightlife, dining, shopping, and quality and availability of affordable housing. Resonance Consulting posits that while Programming factors by themselves are fairly insignificant, together they can promote, or hamper, a community's connection to place.

PROGRAMMING SUMMARY

The Gulf Coast Region is competitive with other regions in its nightlife, entertainment and premier dining establishments. The number of restaurants, drinking establishments, and shopping venues are on par in offering a diversity of culture that is welcoming to all. The large number of homes built within the past 30 years makes modern, affordable living a convenience. Recent investments in housing infrastructure is complemented by low median home prices and low median property taxes, making the Gulf Coast appealing to home buyers.

NIGHTLIFE

There is ample evidence that the Mississippi Gulf Coast Region has a vibrant and diverse nightlife and things to do in the evenings and on weekends. With 12 casinos spread throughout the region, there are opportunities for entertainment ranging from gaming, to shows and performances. According to TripAdvisor, there are also many bars, pubs and bistros that visitors frequent. Each of these establishments has created its own identity with visitors. The large number of options available for entertainment cater to the diverse culture that is prevalent on the Gulf Coast.

DINING

In 2017, there were 760 Food Services and Drinking Places (NAICS 722) businesses within the Gulf Coast Region (EMSI, 2018). The majority of these businesses were comprised of the following:

- Limited-Service Restaurants (722513) - 312 locations
- Full-Service Restaurants (722511) - 289 locations

These two types of restaurants primarily make up the industry, followed distantly by:

- Drinking Places (Alcoholic Beverages) (722410)
- Caterers (722320)
- Mobile Food Services (722330)

DINING

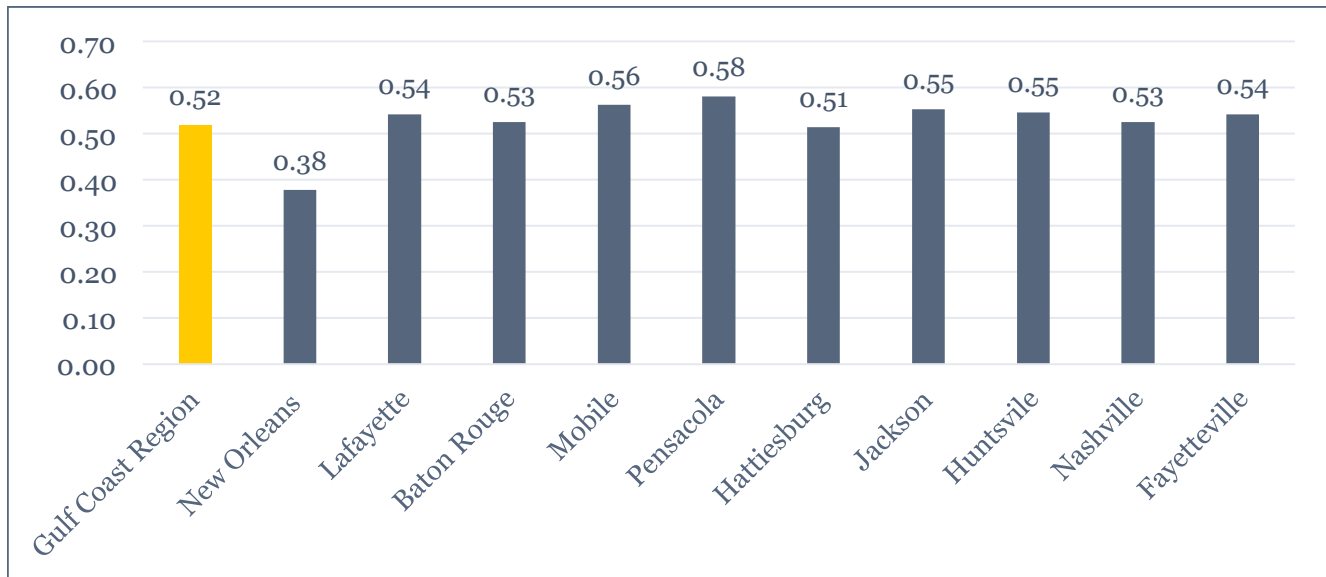
The Gulf Coast Region has a large variety of options that are diverse in culture

In terms of quality dining establishments, Full-Service Restaurants offer the full-service dining experience, and would be a useful metric by which to measure quality dining options in the Gulf Coast region. Gulf Coast Region has comparable number of food and drinking establishments with a ratio of 0.52 establishments per 1,000 people (see Chart 17). This is good because it is important in attracting the higher skilled,

higher producing workers in the innovative and creative class, those who would most likely work at high quality establishments.

CHART 17

Number of Food and Drinking Establishments (NAICS 722) (per 1,000 people)



Source: EMSI, 2018 - NAICS Code 722

BREWERIES

The Gulf Coast Region is home to five breweries and one distillery and each brews their own unique craft beer and offers tastings and tours. Lazy Magnolia, Mississippi's first brewery, brews beer that is sold both locally and regionally. Hops and Growlers is a microbrewery offering 20 craft beers on tap. Chandeaur Brewing Company brews ales using only malted barley, hops, and local ingredients. Crittenden Distillery, LLC is a small craft distillery producing rye, corn, and bourbon whiskey. Crooked Letter Brewing Company is a full bar and grill that serves the brand's specialty brews. Biloxi Brewing Company sells locally to the Gulf Coast Region.



Source: GulfCoast.org, 2018

SHOPPING

The Gulf Coast is performing well in meeting the majority of retail shopping needs (95.1 percent) based upon total demand for the region. Baton Rouge and Fayetteville both experienced leakage in retail, while the other comparative cities have not. The leakage/surplus for the sector of Retail Trade (NAICS 44) is shown in Table 7.

TABLE 7

Retail Trade Leakage Comparative Analysis (in \$)

	2017 TOTAL SALES	2017 TOTAL DEMAND	TOTAL LEAKAGE/ SURPLUS
GULF COAST REGION	1,644,971,354	1,565,097,069	79,874,285
NEW ORLEANS	6,320,617,572	6,287,307,239	33,310,333
LAFAYETTE	2,658,863,534	2,122,710,541	536,152,993
BATON ROUGE	4,209,669,483	4,611,532,620	(401,863,137)
MOBILE	1,924,855,530	1,833,100,952	91,754,578
PENSACOLA	2,210,925,375	2,002,878,346	208,047,029
HATTIESBURG	794,470,948	559,385,498	235,085,450
JACKSON	2,956,705,825	2,636,686,270	320,019,555
HUNTSVILLE	2,317,789,835	2,287,941,140	29,848,695
NASHVILLE	12,301,553,283	10,730,540,951	1,571,012,332
FAYETTEVILLE	2,570,582,696	2,799,038,123	(228,455,427)

Source: EMSI, 2018

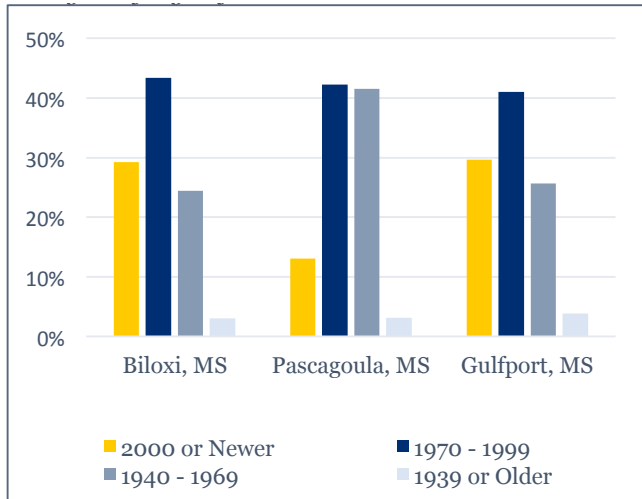
AGE OF HOMES

Of the four regions studied, Neighborhood Scout (2018) reported that the Gulf Coast Region has built more homes in the 2000 or newer timeframe. Hurricane Katrina may be the cause of this because Biloxi and Gulfport are the two highest in this category (both fall just below 30 percent). The Gulf Coast Region also had the fewest number of houses built in 1939 or older (below 5 percent), indicating that the overall housing infrastructure is newer and up to date. The Gulf Coast Region is most comparative with Louisiana Region in the categories of homes built between 1940-1969 and homes built between 1970-1999.

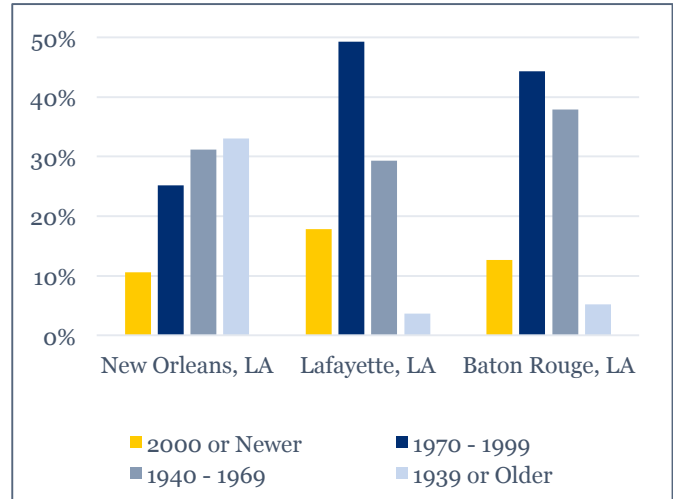
Fayetteville, Arkansas experienced a tremendous increase in the number of new homes built in the 2000's due to city planning efforts aimed toward becoming a start-up community for entrepreneurs, specifically in the technology industry.

CHART 18

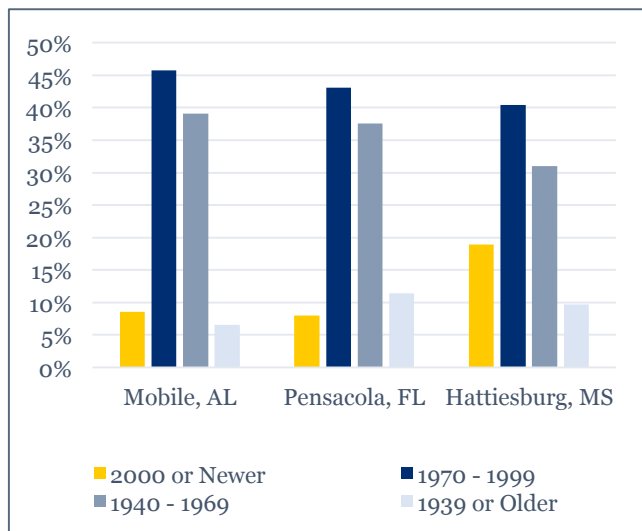
Gulf Coast Region Comparative Analysis of Age of Homes


CHART 19

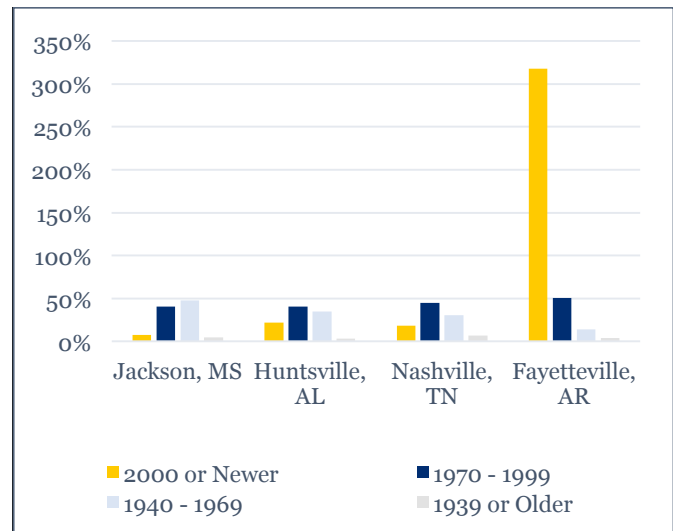
Louisiana Region Comparative Analysis of Age of Homes


CHART 20

Southern Region Comparative Analysis of Age of Homes


CHART 21

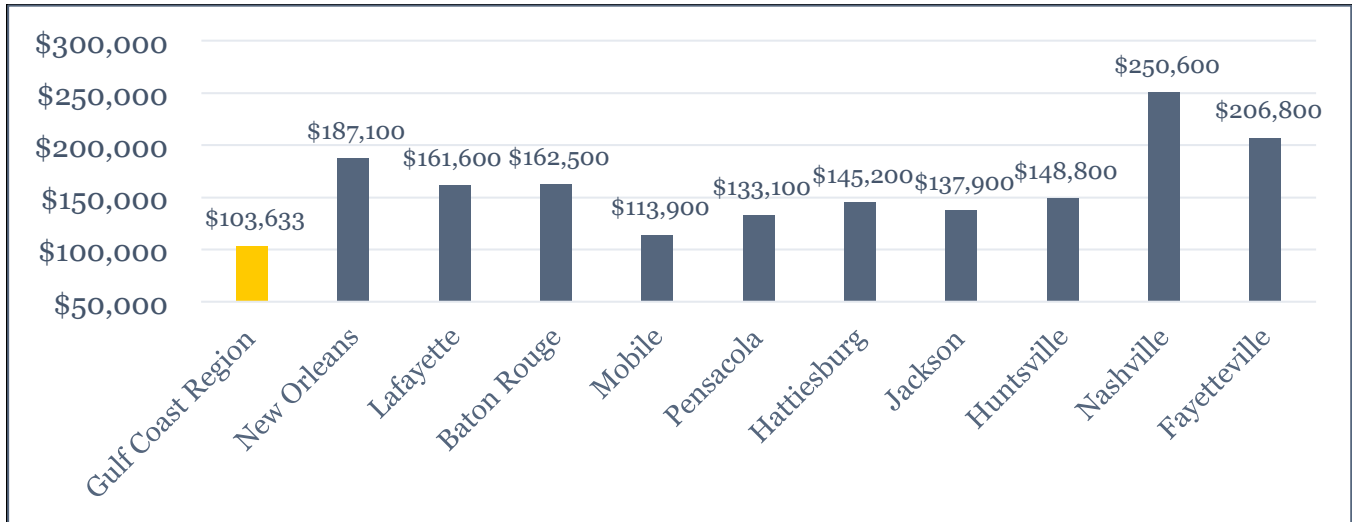
Central Region Comparative Analysis of the Age of Homes



This would be a buyer's market when compared to other locations. The Gulf Coast Region has the lowest median home prices (\$103,633) compared to the other cities (see Chart 22). Mobile, Pensacola and Jackson are just above the Gulf Coast Region. The communities with the highest median home value are Nashville, followed by Fayetteville and New Orleans.

CHART 22

Median Home Price (2018)

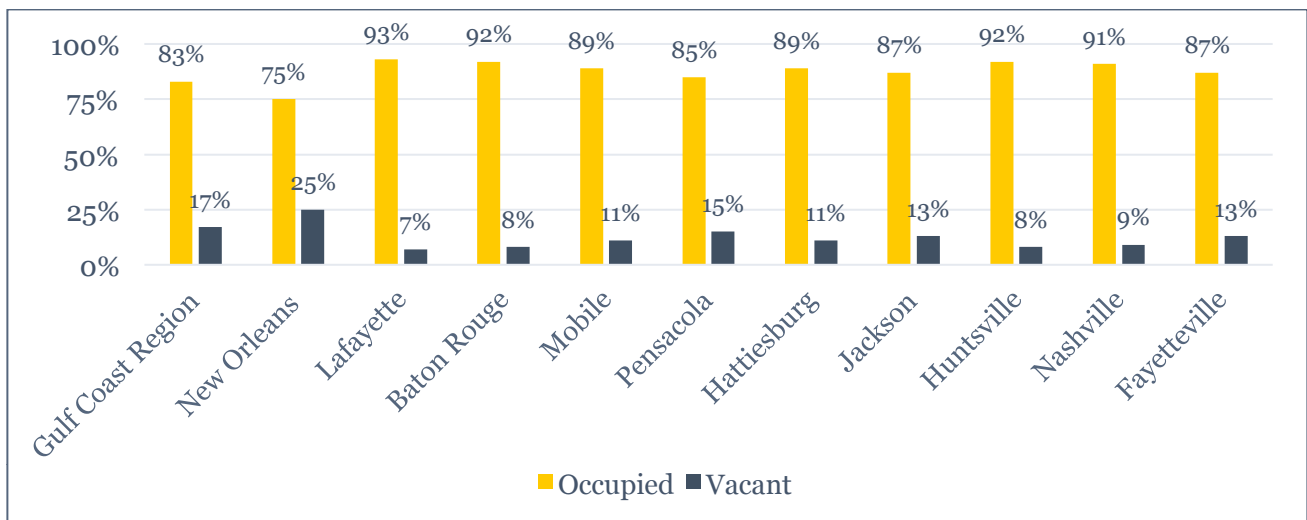


Source: Sperling's Best Places, 2018

The Gulf Coast Region has an 83 percent renter occupancy rate and 17 percent vacancy rate. The 17 percent vacancy rate in the Gulf Coast Region provides available rental housing within the region. This implies there are available living accommodations favorable for the growth of the Gulf Coast. The community with the highest occupancy rate is Lafayette (93 percent), followed closely by Baton Rouge and Huntsville (both have 92 percent). Pensacola has the most similar occupancy rate to the Gulf Coast Region with 85 percent (see Chart 23).

CHART 23

Renter Occupancy vs Vacancy Rates



Source: Sperling's Best Places, 2018



PEOPLE

A community's most valuable resource is its people – that is, the overall impact of human capital for the community. Previous research of Florida, Jacobs and others measure the diversity of a community as a key element where people meet and socialize with other people unlike themselves, to trade views, and to spar over issues (Florida, 2011-2012).

A diverse community is a place open to outsiders, and it promotes excitement and energy. Innovative and creative-minded people enjoy a mix of influences. This *People* section identifies measurable factors related to diverse populations, diverse occupations, education, talent and creativity, and innovativeness.

PEOPLE SUMMARY

The Gulf Coast Region performs reasonably well in the demographic diversity of its population and with human capital, which is measured by the number of utility patents granted, as compared to the other regions. Improvements can be made in the variety of talent and creativity across industry sectors of its residents and the population's overall educational attainment throughout the Gulf Coast Region. Talent and creativity as well as educational attainment will play a vital role in the attraction of residents to the area, as these are major contributors to the *Place Making and Talent Attraction* of a community.

DIVERSE POPULATIONS

The Gulf Coast Region's population grew by 9 percent from 363,296 in 2008 to 397,226 in 2018 (see Table 8). In 2018, White, Non-Hispanic represents the largest percentage of Gulf Coast's population at 67.4 percent. Growth of other races and ethnicities are outpacing White, Non-Hispanics and thus leading toward an increasingly diverse population. Black, Hispanic and Asian populations increased by 20, 43 and 14 percent, respectively. Research shows that as linguistic, racial and composite diversity increases, then the average income of working age population increases in American communities (Ratna et al. 2017). However, the positive effect of diversity diminishes when the higher proportion of foreign-born population lacks English fluency.

TABLE 7

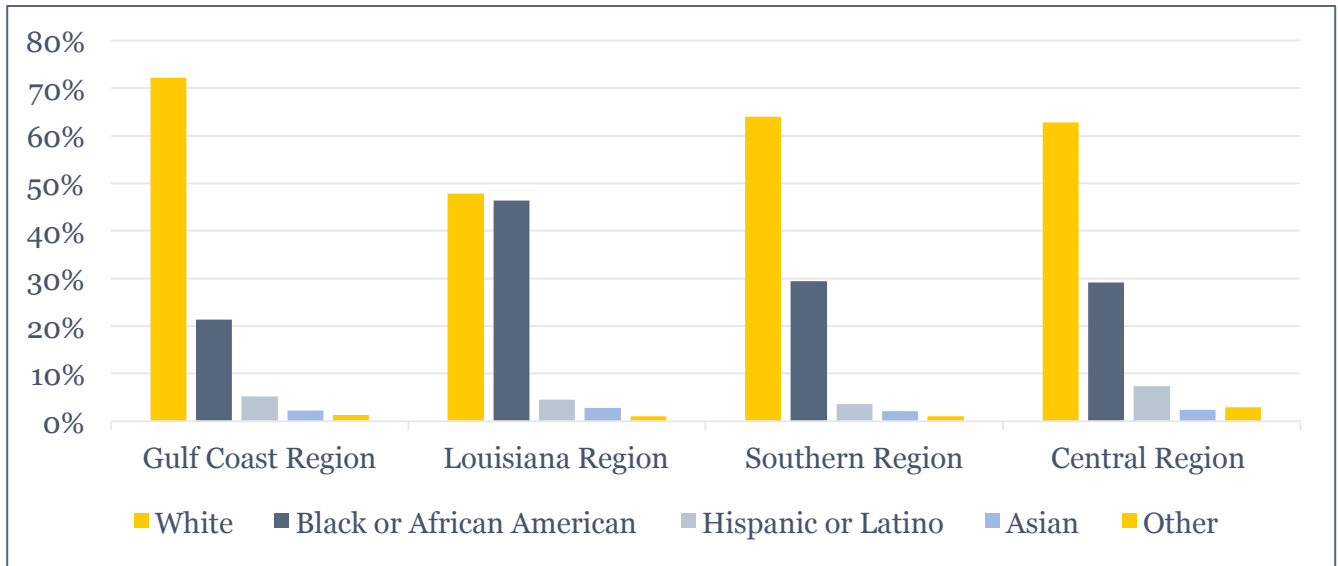
Retail Trade Leakage Comparative Analysis (in \$)

RACE/ETHNICITY	2008 POPULATION	2018 POPULATION	% CHANGE
WHITE, NON-HISPANIC	259,198	267,819	3%
BLACK, NON-HISPANIC	71,881	86,525	20%
WHITE, HISPANIC	13,398	19,183	43%
ASIAN, NON-HISPANIC	8,444	9,634	14%
TWO OR MORE RACES, NON-HISPANIC	6,045	8,590	42%
AMERICAN INDIAN OR ALASKAN NATIVE, NON- HISPANIC	1,579	1,568	-1%
BLACK, HISPANIC	1,254	1,834	46%
TWO OR MORE RACES, HISPANIC	627	1,078	72%
AMERICAN INDIAN OR ALASKAN NATIVE, HISPANIC	309	376	22%
NATIVE HAWAIIAN OR PACIFIC ISLANDER, NON- HISPANIC	296	267	-10%
ASIAN, HISPANIC	199	209	5%
NATIVE HAWAIIAN OR PACIFIC ISLANDER, HISPANIC	66	143	117%
TOTAL	363,296	397,226	9%

Source: EMSI 2018

Compared to the other regions, the demographic diversity of the Gulf Coast Region has a higher percentage difference between white and black populations, a statistic that is becoming more diverse over time (see Chart 24). The Gulf Coast Region is competitive with all other regions in the Hispanic and Asian categories. The Louisiana Region is the most diverse among the regions studied, with a total of 55 percent of its population described as non-white.

CHART 24

Race and Ethnicity Comparative Data (2016)

Source: StateBook, 2016

DIVERSE OCCUPATIONS

The Gulf Coast Region ranks 333 out of the 382 U.S. metro areas as measured by occupation diversity (see Table 9). An occupation diversity ranking helps quantify how jobs are distributed across industry clusters. Diversification among occupations is a worthy goal for local economic development organizations and communities because it supports the competitiveness and growth of a variety of specializations or clusters for the local economy. Hunstville, AL ranks highest on the comparison community list in occupation diversity.

TABLE 9

Occupation Diversity Ranking

	OCCUPATION DIVERSITY RANKING
HUNTSVILLE, AL	7
BATON ROUGE, LA	92
NASHVILLE-DAVIDSON--MURFREESBORO--FRANKLIN, TN	106
JACKSON, MS	118
MOBILE, AL	187
LAFAYETTE, LA	189
PENSACOLA-FERRY PASS-BRENT, FL	235
NEW ORLEANS-METairie, LA	256
FAYETTEVILLE-SPRINGDALE-ROGERS, AR-MO	296
GULFPORT-BILOXI-PASCAGOULA, MS	333
HATTIESBURG, MS	339

Source: EMSI

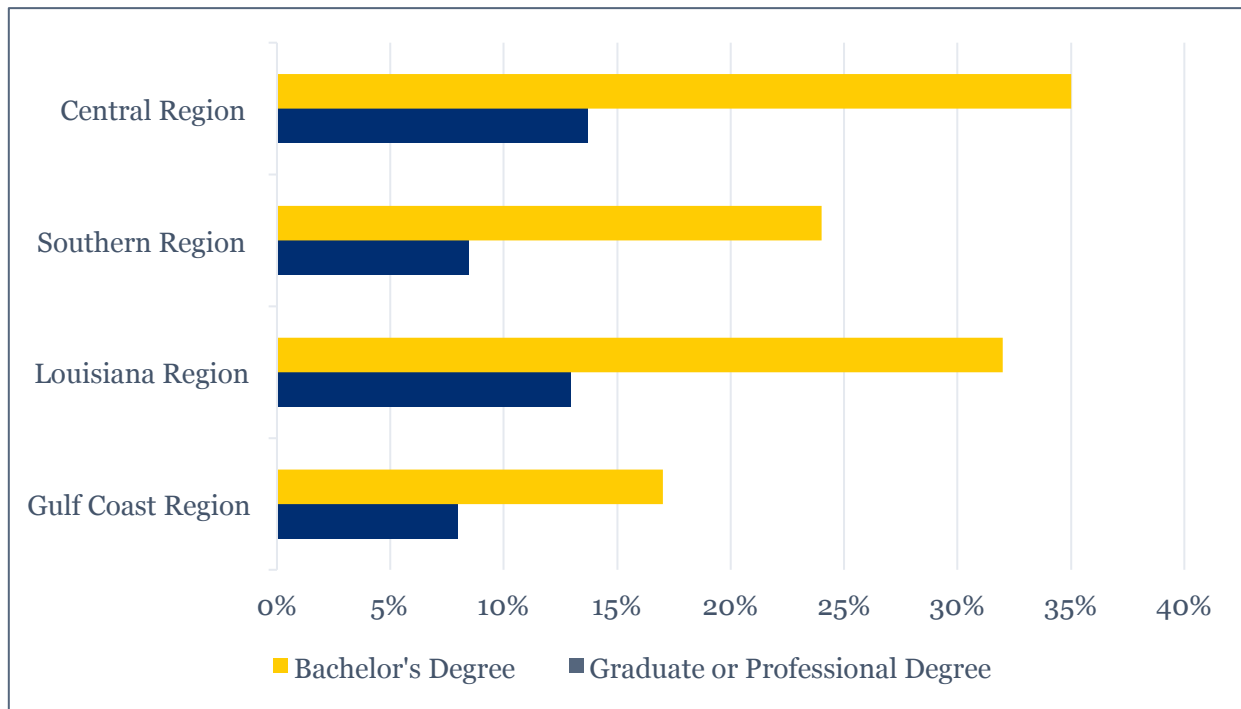
EDUCATION

To be attractive, a Place needs to offer a gathering of highly productive people, companies and resources. If the Gulf Coast Region hopes to be competitive in attracting the creative class and growing new innovations, then it must improve the educational attainment of its population and encourage more enrolled post-secondary education. In 2018, the Gulf Coast Region will have 17 percent of its population attaining a bachelor's degree, as compared to Louisiana, Southern and Central Regions of 32, 24 and 35 percent, respectively. Subsequently, the Gulf Coast Region's graduate or professional degrees, at 8 percent, fall behind the comparative regions as well. Nonetheless, for measurable purposes, it is closely competitive with that of the Southern Region which is also 8 percent (see Chart 25).

EDUCATION

- Encourage more adults to complete post-secondary training needed for higher-skilled jobs.
- Align post-secondary education with innovative jobs.

CHART 25

Bachelor Degree or Higher

Source: StateBook, 2016

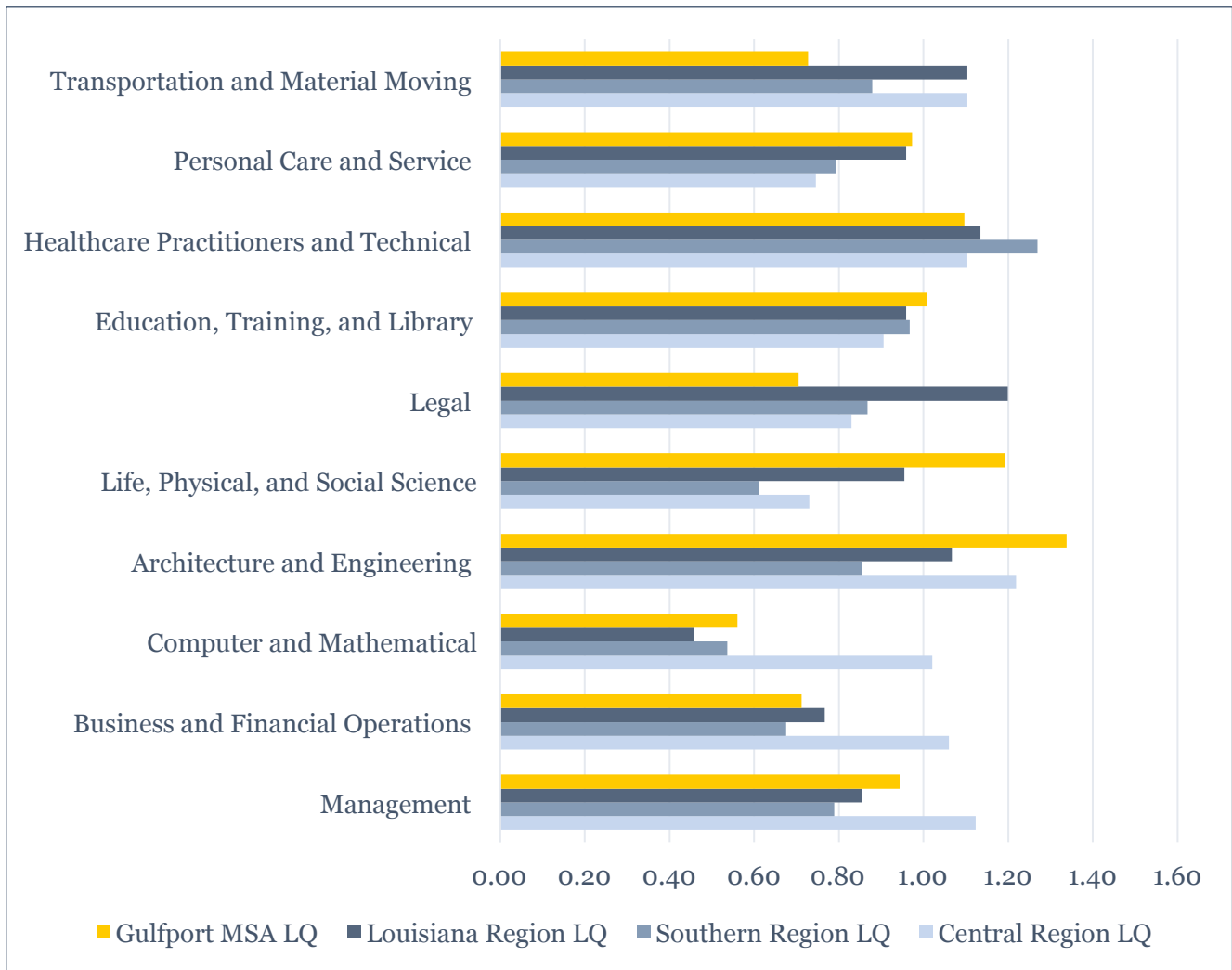
TALENT OF THE INNOVATIVE AND CREATIVE WORKFORCE

The presence of an innovative and creative workforce in the Gulf Coast Region can be measured using a location quotient (LQ) or a measure of the "concentration" of a particular group of industries. Industries with an LQ of 1.25 or higher are classified as "specialized" industries.

The Gulf Coast Region has a high concentration of workforce talent in Architecture and Engineering while the lowest concentration is in Computer and Mathematical occupations (see Chart 26). Human Capital Theory suggests that growing higher-wage, highly productive jobs requiring higher levels of education can have a positive effect on the earnings of the overall community (Glaeser, 2011). Chart 26 details the workforce talent concentration for the regions of the innovation and creative workforce (EMSI, 2017). A focus for the Gulf Coast Region should be aligning education and industry to grow the kind of jobs that would generate the highest multiplier effect on the overall economy.

TALENT
Increase the percentage of jobs that generate the highest multiplier effect on the economy

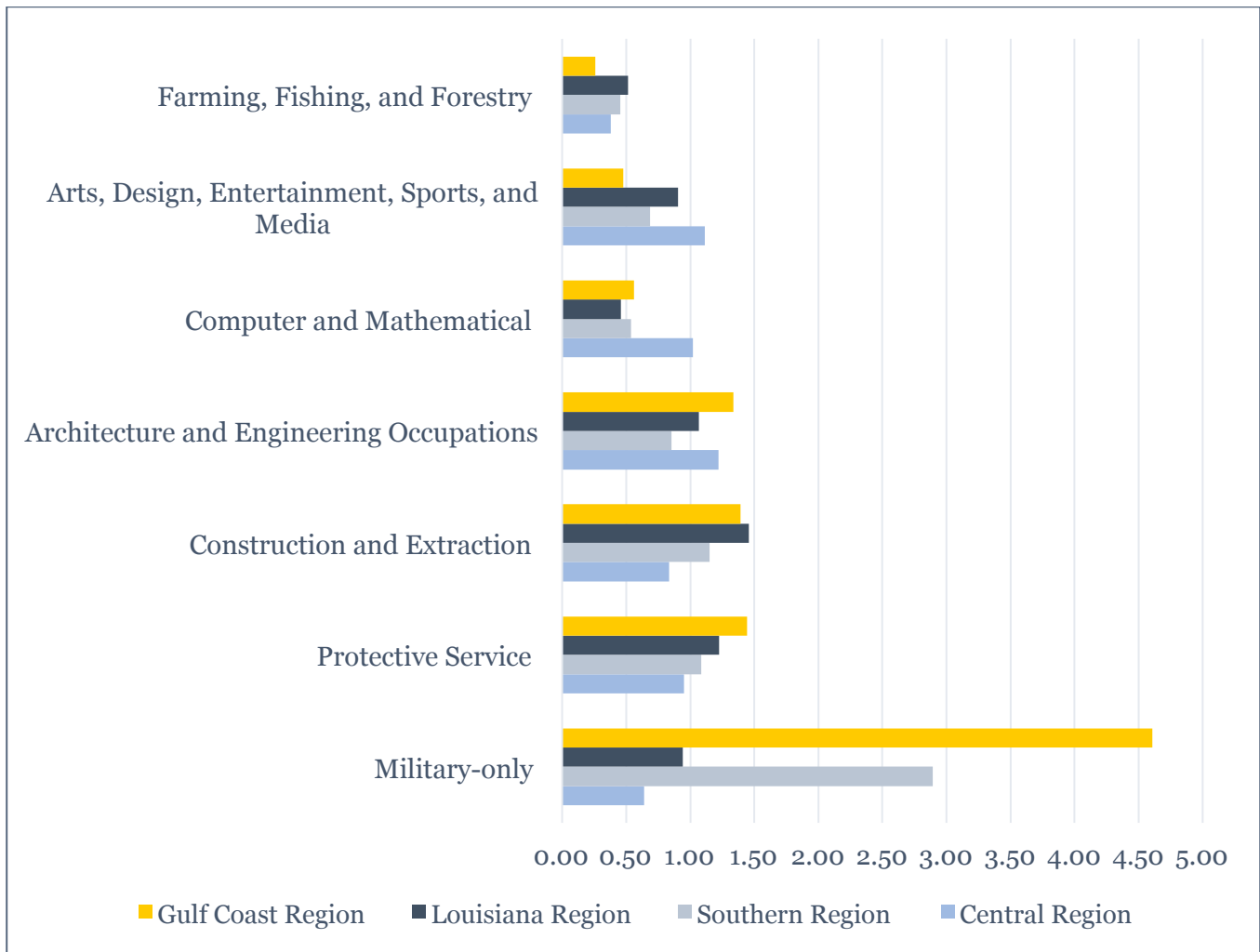
CHART 26

Location Quotients for the Creative Class (2017)

Source: EMSI, 2017

The Gulf Coast Region has the highest occupation concentration rankings amongst the comparative cities in the areas of Military, Protective Services and Construction occupations. Lower concentrations were in Computer and Mathematical, Arts, Design and Entertainment, and Farming, Fishing and Forestry occupations (see Chart 27).

CHART 27

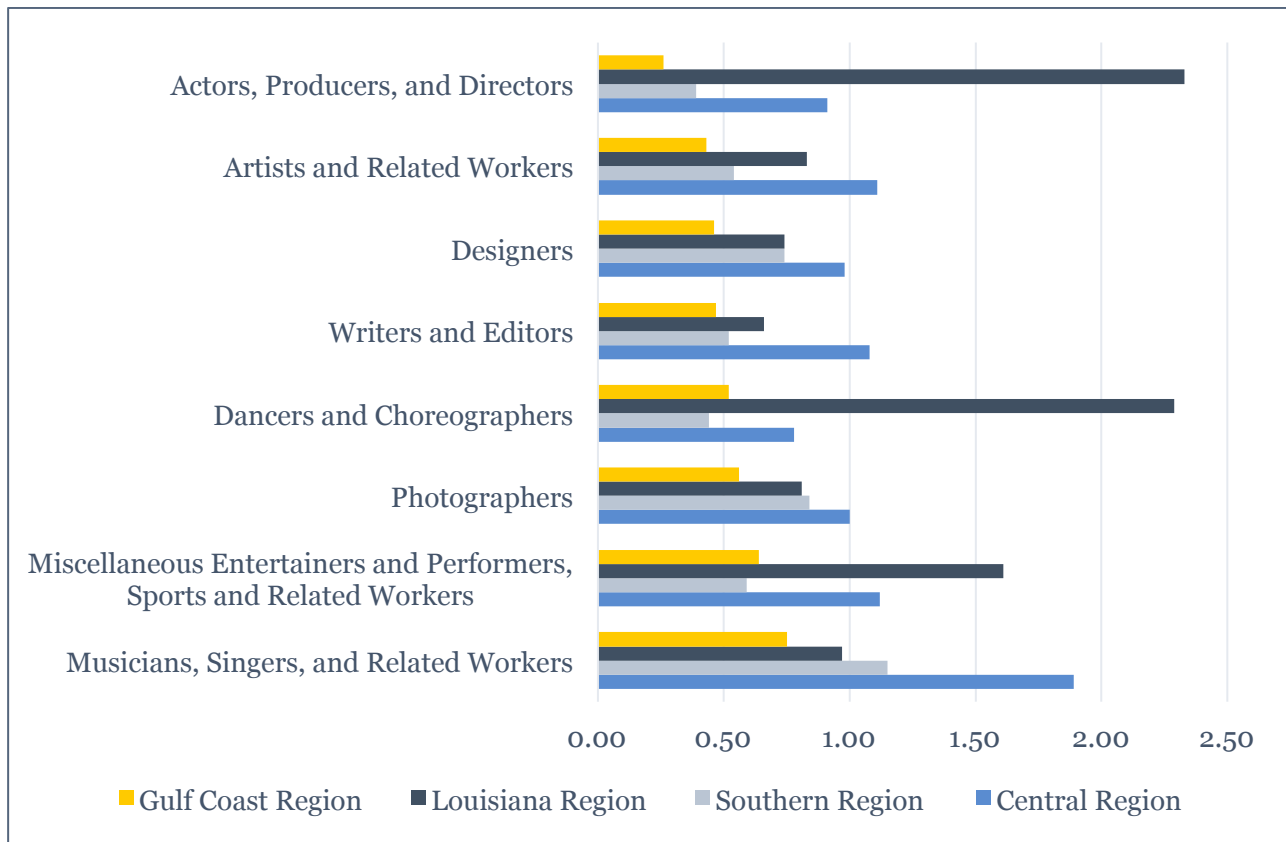
Workforce Skills Occupation Concentration (2017)

Source: Jobs EQ, 2017

ARTISTICALLY CREATIVE WORKFORCE

One measure used to assess Quality of Place is the presence of artistically creative people. These individuals are part of Richard Florida's (2002) creative class, and they can have a positive effect on a community in terms of their contributions to cultural aspects of that community. The Gulf Coast has several facilities centered on Art & Culture, according to *GulfCoast.org*, that include art museums, historic sites, sports venues, music, entertainment and restaurants. Chart 28 shows the concentrations on the Gulf Coast Region of occupations centered around creativity and creative development of art and design products. These occupations bring different perspectives, and creative talent, and add to the liveliness and culture of the community. The Gulf Coast Region has a lower concentration of these occupations than the other three regions.

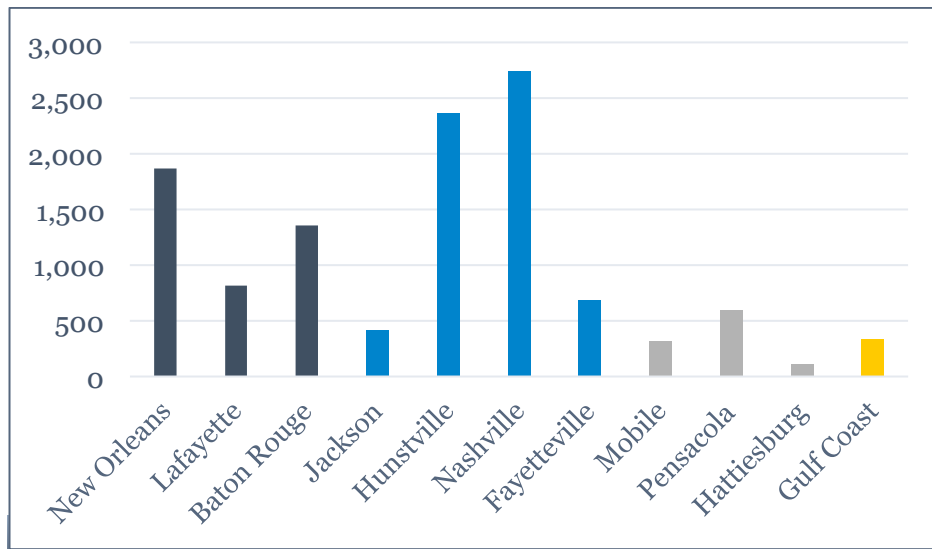
CHART 28

Artistically Creative Occupations Concentration

Source: EMI, 2018

INNOVATIVENESS

According to data from the U.S. Patent and Trademark Office (2015), the Gulf Coast Region makes up 20 percent of the utility patents granted per capita (see Chart 29). Patents per capita can serve as an indication of the overall level of innovation being produced in an area. While the Gulf Coast Region is in a good position in terms of innovation, this data suggests there is room for improvement for the area. The presence of entities such as The University of Southern Mississippi, Stennis Space Center, and the Biloxi Innovation Center presents opportunities for increased innovation along the Gulf Coast.

CHART 29*Innovation Based on Patents per Capita*

Source: U.S. Patent and Trademark Office, 2015



PROMOTION

Individuals who represent the innovative and creative workforce are modern, connected thinkers who value instant access to information at their fingertips. Therefore, a community must tell its story through a variety of internet-based promotional methods, particularly in the area of social media. More populated metro areas have a competitive advantage of being promoted more frequently due to larger scale events and media coverage. Smaller communities can still be highly successful in promoting themselves because of the benefits of social media and targeted marketing initiatives. This section of the study evaluated common promotional methods of the Gulf Coast Region compared to the other targeted regions in terms of internet trends and availability of web-based information to the user.

PROMOTION SUMMARY

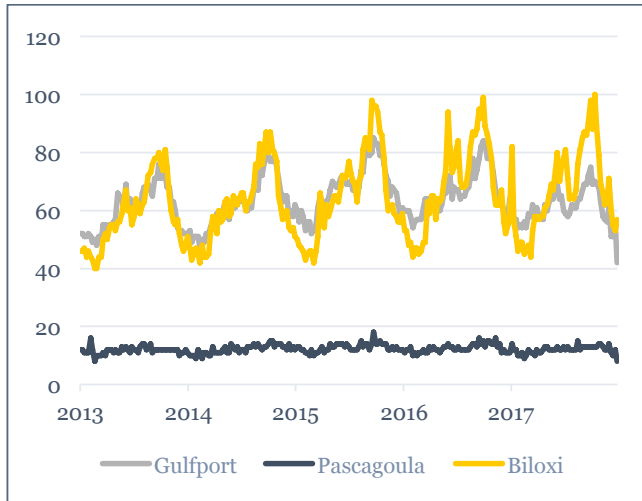
Biloxi has the highest concentration of tourism and casino attractions of the Mississippi Gulf Coast Region, and it is consistently outpacing communities in the Louisiana, Southern and Central Regions in promoting the region as a destination for tourism. This is evidenced by annual search rates derived from Google Trends. Mississippi Gulf Coast Region's tourism website, *GulfCoast.org*, is very well designed to actively promote the region's amenities, attractions and things to experience for its targeted audience of tourists and visitors. However, no evidence of an available website for any of the 11 metro areas studied focuses on attraction of the innovative and creative workforce, with the exception of Nashville. *GulfCoast.org* utilizes various social media platforms comparable to the other cities. The targeted marketing efforts by Visit Mississippi Gulf Coast and other tourism organizations have been successful in growing this tourism-based sector in the Gulf Coast economy.

ANNUAL WEB-BASED SEARCH RATES

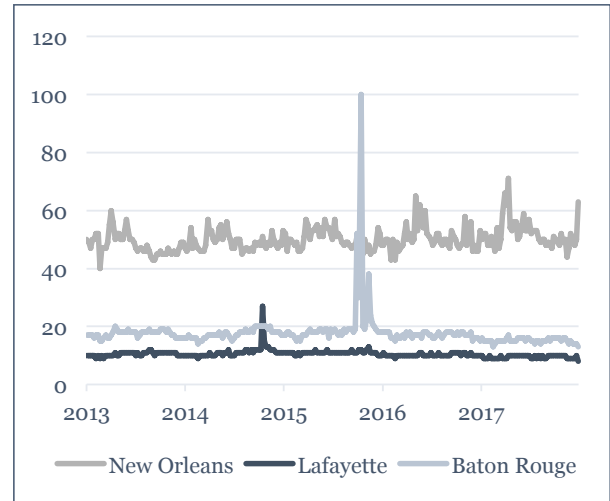
Each community was evaluated by the relative number of times the name of the city was entered into the Google search bar, and the data summaries are displayed by Gulf Coast, Louisiana, Southern and Central Regions (see Graphs 1-4). Annual search rates for City of Biloxi have outpaced other regions for the last two years, reaching the 100 ranking, an achievement that has only been accomplished with temporary spikes for Baton Rouge, Pensacola and Nashville. This number shows the interest over time by comparing the relative searches of a specific time period to the actual search volume over time. The data is set at an index of 100, where 100 is the maximum search interest for the time and location selected. of the Gulf Coast Region, Biloxi and Gulfport are cyclical in nature, which is consistent with a tourism-based economy.

GRAPH 1

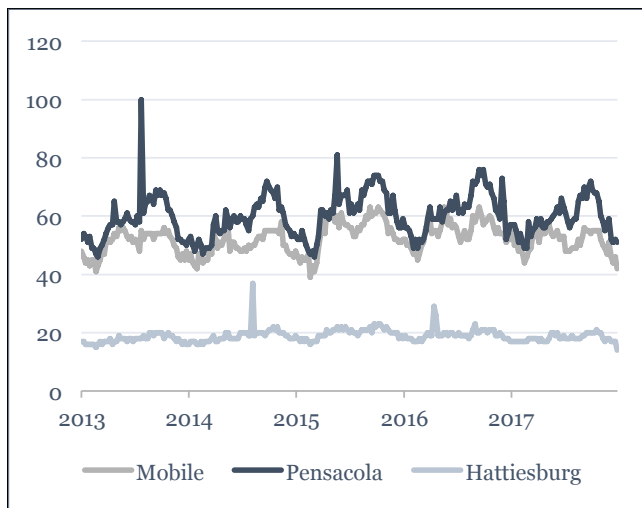
*Gulf Coast Region Comparative
Analysis of Google Trends*

GRAPH 2

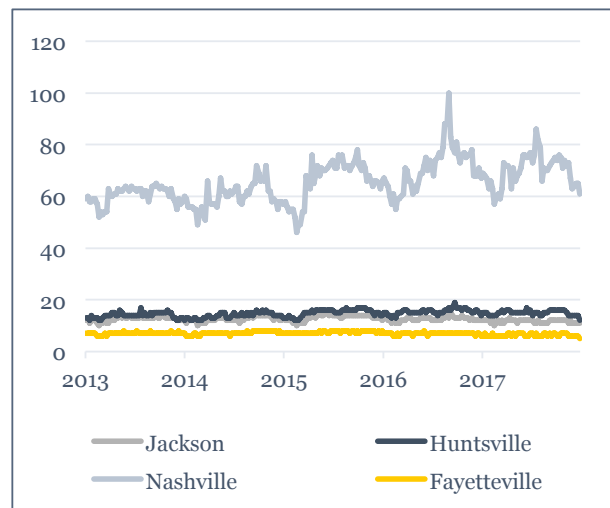
*Louisiana Region Comparative
Analysis of Google Trends*

GRAPH 3

*Southern Region Comparative
Analysis of Google Trends*

GRAPH 4:

*Central Region Comparative
Analysis of Google Trends*



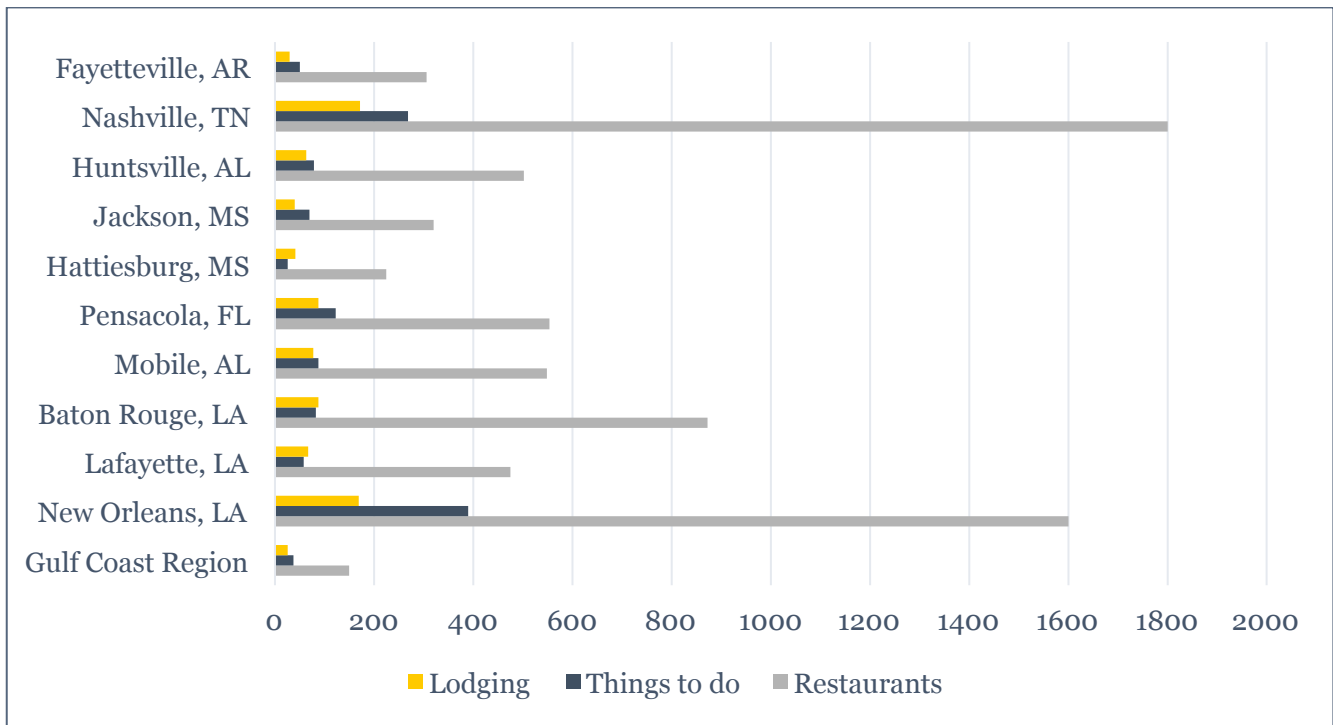
ONLINE TRAVEL SITE REVIEWS

Online travel websites, such as TripAdvisor, offer a platform in which customers and tourists share experiences and give reviews on lodging, things to do, and restaurants. These website reviews build over time and are utilized by millions worldwide when planning visits and influence a community's ability to promote itself. This research evaluated

TripAdvisor search engine to determine the number of businesses listed on TripAdvisor for each region. The research team also evaluated the total number of reviews per community. If the Gulf Coast Region desires to be competitive with other regions, then its goal should be to increase the number of businesses choosing to list on social media sites and encourage patrons to share their experiences. The communities with the highest total number of TripAdvisor business and amenity listings are New Orleans and Nashville (see Chart 30). The Gulf Coast Region's total lodging, things to do and restaurant listings lag behind the other communities. There is opportunity for the Gulf Coast Region to increase awareness of local amenities to the innovative and creative professional workforce.

CHART 30

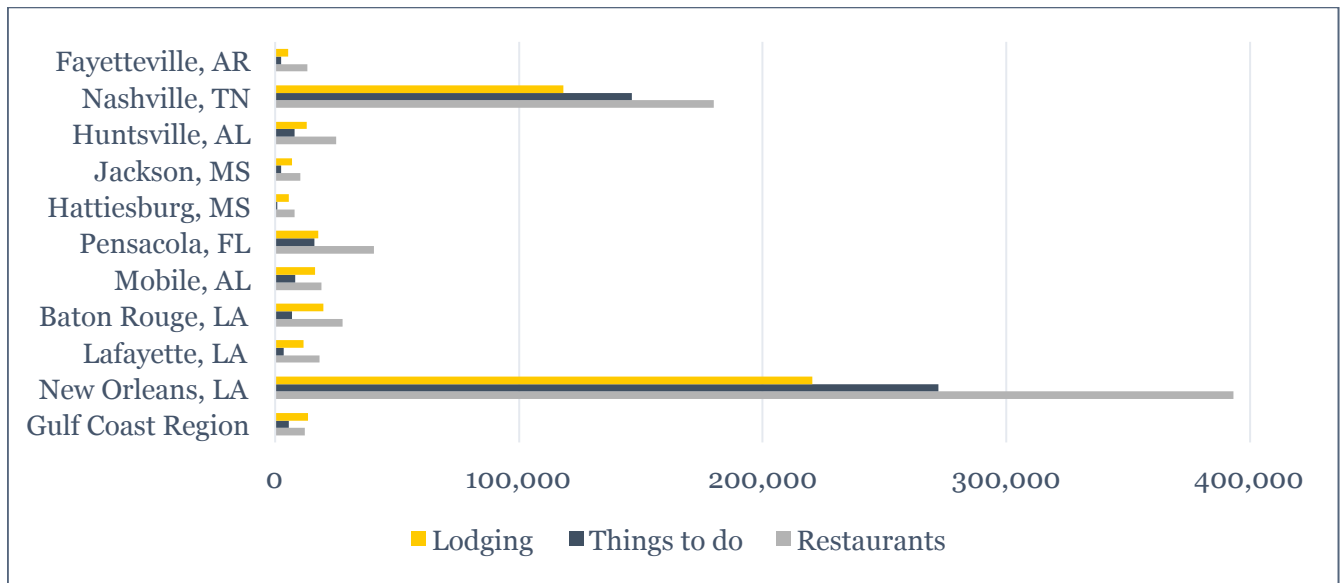
TripAdvisor Number of Listings



Source: Trip Advisor

Promotion of a region not only occurs when a business chooses to list itself on social media but is reinforced when individuals rate their personal experiences. These ratings can be positive or negative but overall they provide valuable feedback to both the business and community. The community with the highest total number of customer reviews is New Orleans. The opportunity for the Gulf Coast Region is to increase the number of positive individual reviews as a feedback tool to market the region (see Chart 31).

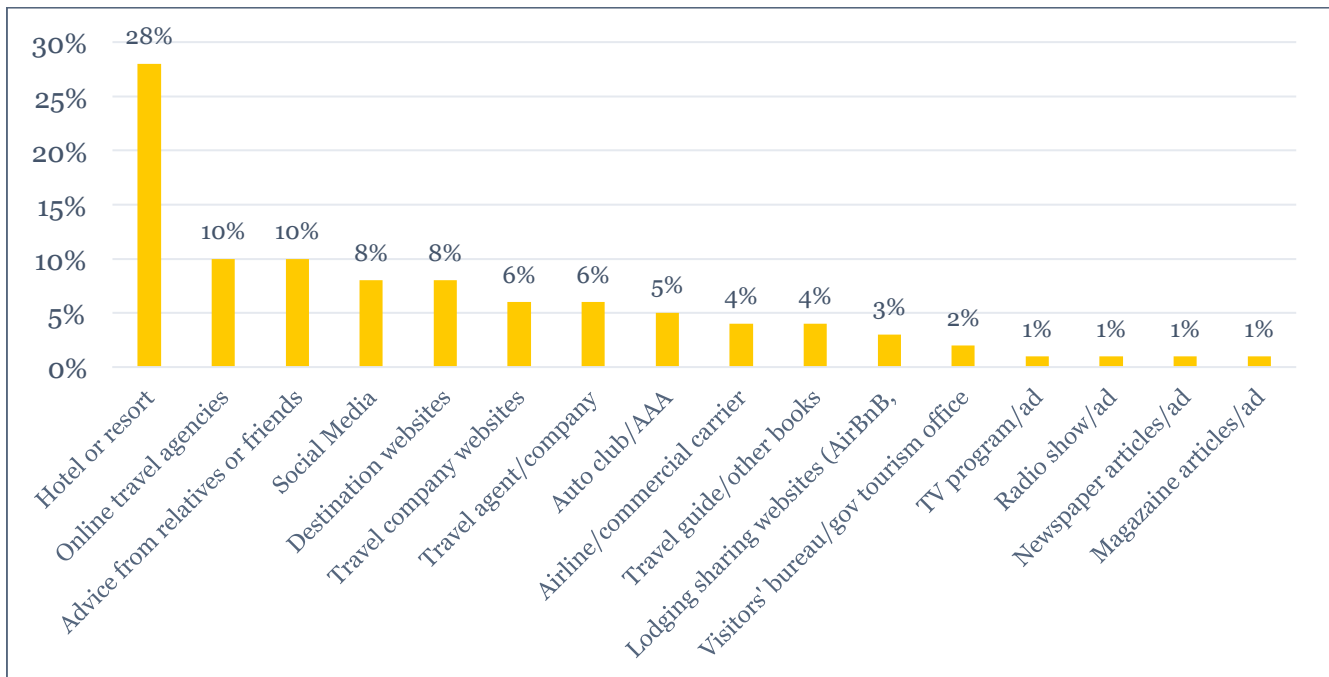
CHART 31

TripAdvisor Number of Reviews

Source: Trip Advisor

Data from the Mississippi Gulf Coast 2017 Visitor Research completed by LongWoods International shows that when planning a trip, visitors look at the information on travel company websites (such as TripAdvisor) 6 percent of the time. The most frequently visited sources of information are the hotel or resort's website, online travel agencies, advice from relatives or friends, and social media. The chart below shows the percentage of each information source used by visitors when planning a trip to the Gulf Coast Region. Hotels or resort was the highest-used source for information at 28 percent, then the percentage drops to 10 percent for online travel agencies and advice from relatives or friends.

CHART 32

Information Sources Used by Visitors when Planning a Trip

Source: LongWoods International, Mississippi Gulf Coast 2017 Visitor Research
 Provided by: Visit MS Gulf Coast

WEBSITE EVALUATION

There are many generic internet websites, such as *Livability.com*, which measure cities across the nation in regard to quality of life, livability or good places to live. However, the research team found evidence of only one of the 11 metro areas evaluated in this study which specifically targeted the potential newcomer planning to live and work in the community: Nashville, Tennessee, with *Nashvilleguru.com*. The website includes targeted messaging for the newcomer, including hotels for temporary living, descriptions of neighborhoods by zip code, an area map showing locations of neighborhoods, and things to do

Although there is no dedicated website for promoting Place Making and Talent Attraction to newcomers choosing to live and work along the Mississippi Gulf Coast, the website *GulfCoast.org* does represent the entire region as a destination location. This section of the report evaluated *GulfCoast.org* as the primary web-based promotional tool to determine how it portrays itself to potential new residents. This will involve meeting three criteria:

1. **Modern Appearance** - The site must be clean, with accurate and concise text. The site should not distract the visitor and should be highly functional. Moreover, if the community wishes to appear attractive to, for instance, technology companies, a modern appearance will be necessary for the city's marketing.
 - a. *GulfCoast.org* website launched in 2015 has a clean, colorful, modern layout. The home page features a dark green and yellow color scheme

and contains information laid out well and is up-to-date. The use of professional photos throughout creates a pleasing aesthetic feel that tells the story of the Gulf Coast to the viewer.

2. User-Friendly Functionality - The site must be easy to use. Too many tabs will reduce the functionality of the site, and most users do not want to search long for the information they seek. It must also be intuitive, with straightforward mechanics and few distractions. Business transactions between the resident and the city should, where possible, accommodate online transactions.

- a. In terms of functionality, the tabs and menus located at the top of the page make it easy for the user to find what he is looking for. The information under the main tabs is plentiful and arranged in a logical order. The search functionality allows users to directly search within the website for what they are looking for and the option to search hotels available creates a warm, welcoming feeling.

3. Tailored Message - The community has an image to project. Whatever it seeks to achieve, whatever future state they would like to see the city in, the website should reflect that. Tailoring the message will also eliminate information overload and give the site a consistent feel (Aspire Internet Design, 2018).

- a. The Gulf Coast presents a tailored message promoting itself as a laid back, relaxing travel destination. The site promotes many amenities and things to experience.

The Gulf Coast Region is promoting itself as an attractive destination location through six of the eight most commonly used forms of social media (see Table 10).

TABLE 10

Social Media Site Review Results

	FACEBOOK	TWITTER	INSTAGRAM	YOUTUBE	PINTEREST	GOOGLE PLUS	TRIP ADVISOR	LINKEDIN
GULF COAST REGION	X	X	X	X	X		X	
NEW ORLEANS	X	X	X	X	X	X		
LAFAYETTE	X	X	X	X	X	X		
BATON ROUGE	X	X	X	X	X		X	X
MOBILE	X	X	X	X	X			
PENSACOLA	X	X	X	X			X	X
HATTIESBURG	X	X	X					
JACKSON	X	X			X	X		
HUNTSVILLE	X	X	X	X	X			
NASHVILLE	X	X	X	X	X			
FAYETTEVILLE	X	X	X		X		X	

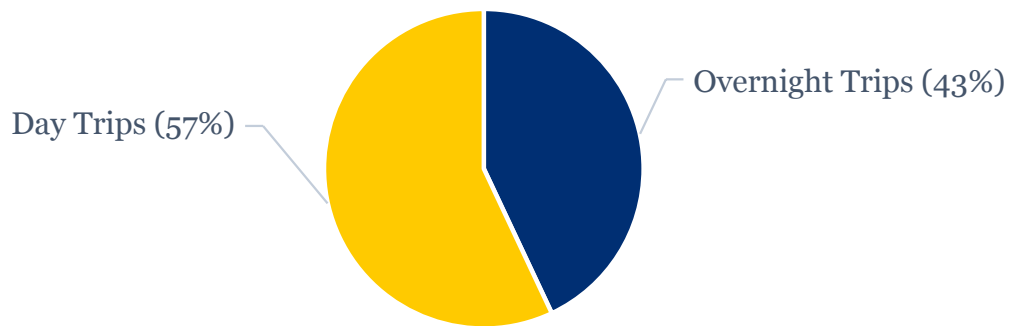
Sources: gulfcoast.org; neworleans.com; lafayettetravel.com; visitbatonrouge.com; mobile.org; visitpensacola.com; www.visithburg.org; visitjackson.com; huntsville.org; visitmusiccity.com; experiencefayetteville.com

DOMESTIC TRAVEL MARKET

The Gulf Coast Region attracts more visitors for day trips (57 percent) than it does for overnight trips (43 percent) (see Graph 5). The large amount of lodging availability within the Gulf Coast Region provides opportunity to create and promote more overnight attractions. Increasing the amounts of overnight trips allows the Gulf Coast Region a longer amount of time to make the intended impression on visitors.

GRAPH 5

Ratio of Day Trips to Overnight Trips (2017)



Source: LongWoods International, Mississippi Gulf Coast
2017 Visitor Research
Provided by: Visit MS Gulf Coast

Conclusion

This report examined the Mississippi Gulf Coast from the perspective of factors that draw the innovative and creative workforce to want to live and work in the region. The report compared the Mississippi Gulf Coast to other metro areas including those that rank high in both the Policom Annual Economic Ranking and the U.S. News & World Report's Best Cities to Live In rankings. Other cities were also included because they comprise competitive metro areas located in the Gulf Region.

Prosperity – The Mississippi's Gulf Coast Region has an advantage of having the lowest cost of living, making it a more affordable place to live than other regions studied. However, its overall economic strength lags behind the other benchmark communities in growing specialized occupations with high multiplier effects on the economy.

- Recommendation: Focus attention on activities that fuel economic growth in occupations with high multiplier effects on the economy.
- Recommendation: Build upon the strengths of local research universities, federal research labs, and high-tech industry sectors to target more high paying jobs in the innovative and creative economy.

Place – The Mississippi Gulf Coast Region has a competitive advantage in having a coastline appealing to population growth.

- Recommendation: Promote the coastline as an appealing amenity to people seeking to live and work in coastal communities.
- Recommendation: Promote the Gulf Coast's climate and air quality data.
- Recommendation: Promote the region's total heating and cooling degree days as competitive in energy efficiency considerations for new companies locating in the region.
- Recommendation: Promote safety as a priority and support law enforcement agencies seeking accreditation as a means of demonstrating high quality services.

Product – The Gulf Coast Region is competitive with other regions in its nightlife, entertainment and premier dining establishments. The number of restaurants, drinking establishments, and shopping venues are on par in offering a diversity of culture that is welcoming to all. The large number of homes built within the past 30 years makes modern, affordable living a convenience. Recent investments in housing infrastructure is complemented by low median home prices and low median property taxes, making the Gulf Coast appealing to home buyers.

People – The innovative and creative workforce concentration level is outpacing other regions in the general occupation categories of Life, Physical & Social Sciences; Personal Care & Service; and Architecture and Engineering professions. Additionally, the region's concentration of Education, Training & Library; and Management Occupations are on par with other regions. The region, however, is lagging in Legal Occupations; Computer & Mathematical; Business & Finance; and Transportation &

Material Handling, comparatively speaking.

- Recommendation: Foster the continued growth of diverse workforce occupations in which the Gulf Coast Region is outpacing other regions. Conduct targeted messaging to recruit these innovative and creative occupation categories to the region.
- Recommendation: Encourage more adults to complete post-secondary training needed for higher-skilled jobs.
- Recommendation: Align post-secondary education with innovative jobs that have the highest multiplier effect for the economy.
- Recommendation: Build upon the Gulf Coast's large concentration of military occupations, which are leading-edge advanced occupations.
- Recommendation: Promote the artistically creative class of workers and business owners who are devoted to cultural and artistic expression.

Promotion – The Gulfport-Biloxi-Pascagoula MSA is competitive with other regions in promoting itself through social media as measured by Google Trends. Efforts to perform targeted market promotions through organizations like Visit Mississippi Gulf Coast appear to be working well and are competitive with other tourist destination locations like New Orleans, Pensacola, and Nashville.

- Recommendation: Expand lessons learned from targeted Gulf Coast tourism marketing strategies to attract the innovative and creative class of workers wanting to live and work in the region. Very few websites were found with targeted messaging for the individual planning to move into a region.
- Recommendation: Increase the number of businesses choosing to list themselves on social media sites, which encourage patrons to share reviews.

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